Love & Resilience

Confluence Philanthropy’s 7th Annual Practitioners Gathering

March 14th - 16th, 2017
Hotel Monteleone, New Orleans, LA

Own What You Own

#OwnWhatYouOwn
## AGENDA OVERVIEW

### Tuesday, March 14, 2017

#### Pre-Conference Events

<table>
<thead>
<tr>
<th>Time Slots</th>
<th>Event Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30</td>
<td>Breakfast &amp; Registration</td>
<td>(7:30 – 9:00 AM)</td>
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<tr>
<td>8:00</td>
<td>Practitioner Institute Track</td>
<td>Open to Confluence Practitioner and Advisor Members Only (9:00 AM to 12:00 PM)</td>
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<tr>
<td>8:30</td>
<td>Welcome Track</td>
<td>Open to all Pre-Conference Attendees (9:00 AM to 12:00 PM)</td>
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<tr>
<td>9:00</td>
<td>Break &amp; Board Buses for Field Trips</td>
<td>Pre-Registered Attendees Only (12:00 – 12:30 PM)</td>
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<tr>
<td>9:30</td>
<td>Field Trips &amp; Off-Site Sessions</td>
<td>Pre-Registered Attendees Only (12:30 – 4:30 PM)</td>
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<tr>
<td>10:00</td>
<td>Return from Field Trips</td>
<td>(4:30 – 5:30 PM)</td>
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<tr>
<td>10:30</td>
<td>FREE TIME</td>
<td>(5:30 – 6:30 PM)</td>
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<tr>
<td>11:00</td>
<td>Welcome Reception</td>
<td>All are Welcome (6:30 – 7:30 PM)</td>
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<tr>
<td>11:30</td>
<td>Dinner</td>
<td>All Conference Attendees Welcome (7:30 – 9:00 PM)</td>
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### Non-Solicitation Policy

Confluence Philanthropy is not a funding organization, nor do we channel philanthropic capital directly to discreet individuals, investment opportunities or funds.

The Practitioners Gathering is intended to serve as a private space for foundation leaders and their advisors to meet and to strategize about the best use of assets in fulfilling their organization mission. In order to retain the integrity of this convening we must maintain a strict policy of non-solicitation during and after the event. We ask that advisors and grantseekers do not solicit Practitioner Investors unless invited.

Those who violate this policy will not be invited to participate in future meetings. Thank you for your support in protecting the intent of the Practitioners Gathering.
<table>
<thead>
<tr>
<th>Time Slots</th>
<th>Wednesday, March 15, 2017</th>
<th>Thursday, March 16, 2017</th>
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<tbody>
<tr>
<td>7:30</td>
<td>Breakfast &amp; Registration (7:30 – 8:30 AM)</td>
<td>Breakfast &amp; Registration (7:30 – 8:45 AM)</td>
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<tr>
<td>8:00</td>
<td>Active Owners Breakfast Conversation (7:30 – 8:30 AM)</td>
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<td>8:30</td>
<td>BREAK (8:30 – 8:45 AM)</td>
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<td>9:00</td>
<td>Board Welcome (8:45 – 9:00 AM)</td>
<td>Morning Introduction (8:45 – 9:00 AM)</td>
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<td>9:30</td>
<td>Plenary (9:00 – 10:30 AM)</td>
<td>Keynote: Sister Patricia Daly (9:00 – 9:50 AM)</td>
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<td>10:00</td>
<td>Community Reflections (10:30 – 11:00 AM)</td>
<td>Plenary (9:50 – 11:05 AM)</td>
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<td>11:00</td>
<td>BREAK (11:00 – 11:15 AM)</td>
<td>Special Announcement: Climate Investing (11:05 – 11:15 AM)</td>
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<tr>
<td>11:30</td>
<td>Keynote: Jane Goodall (11:15 AM – 12:15 PM)</td>
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<tr>
<td>12:00</td>
<td>LUNCH (12:15 – 1:30 PM)</td>
<td>Concurrent Sessions (Choose One) (11:30 AM – 12:45 PM)</td>
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<td>12:30</td>
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<td>LUNCH (12:45 – 2:00 PM)</td>
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<tr>
<td>1:00</td>
<td>Concurrent Sessions (Choose One) (1:30 – 2:45 PM)</td>
<td>Confluence Member Meeting (Members Only) (2:00 – 3:00 PM)</td>
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<td>2:00</td>
<td>FREE TIME (2:45 – 4:00 PM)</td>
<td>Open Networking (3:00 – 5:00 PM)</td>
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<td>2:30</td>
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<td>Working Group Meetings C2C, Divest/Invest – Transform Finance (3:00 – 5:00 PM)</td>
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<td>4:00</td>
<td>Evening Keynote: James Hansen (4:00 – 5:00 PM)</td>
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<td>4:30</td>
<td>Evening Plenary (5:00 – 6:30 PM)</td>
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<td>6:30</td>
<td>BREAK (6:30 – 6:45 PM)</td>
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<tr>
<td>7:00</td>
<td>Toast to Impact Advisors &amp; Parade Staging All are Welcome (6:45 – 7:00 PM)</td>
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<td>7:30</td>
<td>Second Line Parade to Louisiana State Museum (7:00 – 7:30 PM)</td>
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<tr>
<td>7:30</td>
<td>Gala Reception &amp; Dinner at Louisiana State Museum (7:30 – 10:00 PM)</td>
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GETTING TO THE HOTEL & CONFERENCE SITE

TRANSPORTATION FROM AIRPORT
Airport Shuttle to the Hotel Monteleone meets every flight at the Louis Armstrong International Airport. Proceed from baggage claim to the transportation center for shuttle service. The one-way rate is $24.00 and round trip is $44.00; both are per-person fares. To make a reservation with Airport Shuttle, please call (504) 522-3500.

DRIVING DIRECTIONS
FROM THE EAST
Take I-10 West toward Baton Rouge. Exit Orleans Ave/Vieux Carre (Exit 235A). Proceed down ramp and turn left at the light onto Orleans Ave. Continue on Orleans Ave under interstate. Orleans Ave becomes Basin Street. Continue on Orleans/Basin for 0.6 miles. Turn left on Conti Street. Continue six blocks (0.5 miles), turn right on Decatur Street, then right on Bienville Street. Turn left on Royal Street and a valet attendant at the front entrance of hotel will be awaiting your arrival.

FROM THE WEST (AIRPORT)
Take I-10 East toward New Orleans Business District and Slidell. Exit Superdome/Poydras Street (Exit 234B). Proceed down ramp and continue straight for eight blocks, staying in left lane. Turn left onto Camp Street and continue four blocks to Canal Street (a big, two-way boulevard). Cross over Canal Street and continue onto Chartres Street (in the French Quarter). Go two blocks on Chartres Street and turn left on Bienville Street. Turn left on Royal Street and a valet attendant at the Front Entrance of hotel will be awaiting your arrival.

HOTEL PARKING
Hotel Monteleone owns and operates two convenient, 24-hour valet parking facilities. One is located on the property; the other is off-site, one block from the hotel. A valet will be at the front of the hotel, ready to take your car to one of the facilities. The rates are $40 plus tax per day for regular-size vehicles. Rates are subject to change without notice.

“If your heart is broken, make art with the pieces.”
– Shane L. Koyczan
ABOUT OUR LOCATION

THE HISTORIC FRENCH QUARTER
The oldest neighborhood in New Orleans, the French Quarter has a history as rich and complex as its celebrated cuisine. The entire district has been designated a National Historic Landmark with a distinct blend of ornate French and Spanish architecture. The Vieux Carré is the heart of a city defined both by struggle (the Civil War, poverty, civil rights, Hurricane Katrina) and by its population’s resolute celebration of life and survival.

MAP OF FRENCH QUARTER & HOTEL LOCATION
THE HOTEL MONTELEONE
214 ROYAL STREET, NEW ORLEANS, LA
Founded in 1886, The Hotel Monteleone is one of the last great family-owned-and-operated hotels in New Orleans. Five generations have carried on the tradition of Antonio Monteleone, a Sicilian immigrant. The hotel implements a number of measures as part of its Southern Green Hospitality plan to help protect and sustain the environment and community for future generations.
**CONFERENCE LOGISTICS**

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**HOTEL AMENITIES**

**Criollo Restaurant** hosts breakfast, lunch, and dinner, providing guests an opportunity to experience the best of New Orleans’ Creole cuisine.

**The Carousel Bar & Lounge** is a classic New Orleans destination, with a 25-seat circus-themed revolving bar.

**Spa Aria**, on the mezzanine level, offers guests a wide selection of treatments and packages. The heated rooftop pool is open daily from 6:00 am to 10:00 pm and the fitness center is accessible 24 hours a day.

**SPECIAL THIS YEAR**

New Orleans has a vibrant blend of cultures and traditions that make its food spicy and its approaches to social and environmental issues unique. This year’s conference is opening up to its extraordinary host city by inviting local voices to join our conversations and embracing some time-honored traditions to add what New Orleanians call *lagniappe* – “a little something extra, just for you.”

**Changemaking Special Guests:** We’ve invited a select group of regional and issue experts to enrich our community with their perspectives. Look for their bios at the end of this Program Guide.

**Mardi Gras Indians:** Some of the most visible symbols of New Orleans are the Mardi Gras Indians. A part of local black community since the 1800s, self-organized tribes set out each Mardi Gras day in beautifully ornamented, hand-made suits. A year’s worth of effort and planning results in awe-inspiring performances when tribes collide in living theater on the city’s streets. With a retinue led by each tribe’s Big Chief, the groups clash in symbolic battles of dance, percussion and taunting. Each costume costs thousands of dollars and weighs over a hundred pounds and is the pride and focus of a community. Confluence was lucky enough to befriend a representative of the Flaming Arrows tribe during our first site exploration. We thank Daniel DeSilva for assisting us in this year’s planning and joining us for festivities and deep discussion.

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**EVENING SOCIAL EVENTS**

**TUESDAY, MARCH 14**

6:30 Welcome reception – Riverview Room (rooftop)

7:30 Dinner – La Nouvelle Orleans Ballroom (mezzanine level)

**WEDNESDAY MARCH 15**

All conference attendees welcome

6:45 Toast to Impact Advisors – Royal Salon (ground floor)

7:15 Second Line Parade through the French Quarter – Meet in the Royal Salon

7:30 Gala Networking Event and Dinner – Louisiana State Museum

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**Second Line Parade and Brass Bands:** On Wednesday night, we’ll be taking part in one of the unique and beautiful expressions of New Orleans culture – a Second Line parade led by the Kinfolk Brass Band. Originating with jazz funerals in the black community, the ‘first line’ consists of a casket, the bereaved, and the band, with a ‘Second Line’ of followers who join to revel and dance along. Today, Second Line parades are not tied to any particular event and happen weekly throughout the city. Led by brass bands, participation in these roving block parties is contagious and epitomizes the local Creole refrain, *laissez les bon temps rouler*, let the good times roll!

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**SAVE THE DATE!**

8th Annual Practitioners Gathering
San Francisco, Early March 2018
dates to be announced
Call for Sessions Deadline: May 1, 2017
CONFLUENCE PHILANTHROPY

Confluence Philanthropy advances mission-aligned investing. We support and catalyze a community of private, public, and community foundations; families; individual donors; and values-aligned investment managers that represents more than $71 billion in philanthropic assets under management, and over $3 trillion in managed capital. Our members are committed to full mission alignment when prudent and feasible.

Based in the United States, Europe, Latin America, Canada, and Puerto Rico, our members invest around the world. While our members represent diverse institutions, charitable asset types, personal and professional roles, and programmatic missions, they all share a commitment to mission-aligned philanthropy.

Confluence translates learning and connection into concrete action through our annual conferences, webinars, and trainings; we also organize working groups that focus on specific investment and change strategy program areas. We promote mission alignment through most asset classes, investment vehicles, and advocacy strategies, including cash, proxy voting, shareholder engagement, program-related investing, screening public equities, and private equity. We have offices in New York City at the Rockefeller Brothers Fund and in downtown Oakland, California.

“When I asked my grandma what does it take to be successful in life, she said all you need are the three bones: the wishbone, the jawbone and the backbone.”

— Nina Turner, Former Ohio State Senator
BECOME AN ADVISOR MEMBER

Through our Advisor Membership Program, investment advisors and managers who are committed to mission alignment participate directly in Confluence, creating new strategies and opportunities for breaking down walls between funding institutions and the impact investment field. Confluence Philanthropy’s Advisor Membership includes the leading investment advisors, money managers, investment consultants, and asset managers in mission-related investing. Advisors play visible leadership roles in helping to develop the content for more than 20 Confluence events each year, and serve as resources to the Confluence community, industry spokespersons, and partners in leading philanthropy.

This summer Confluence will dramatically expand our membership platform for investment managers to include three discrete tiers of programming: The Practitioner Advisors Program, the Associate Advisors Program, and the Affiliate Advisors Program. This expansion is designed to help emerging managers, board consultants, and CDFIs enter the field of impact investing by offering up an array of meaningful and appropriate roles within the Confluence community. Look for more details as the season unfolds!

How are Practitioner Advisors Chosen?
Advisors are invited to join Confluence through a peer referral process. Each Practitioner Advisor must hold a minimum three-year track record in mission-related investing and have three referrals from foundations or other members of our network. They must then complete an application form to be reviewed by the Membership Committee, with final approval from the Confluence Board of Directors. All Advisors are requested to make an annual contribution based on organizational asset size, which guarantees them one complimentary registration to the Annual Practitioners Meeting.

Protecting Our Members’ Privacy
Confluence will under no circumstances share the contacts of asset owners with Advisor Members. If an investor would like to connect with an Advisor they must do so directly. Furthermore, Advisors are promised neither speaking engagements at our events nor sponsorship opportunities in exchange for speaking engagements. Advisors are encouraged to share their research and publications, which they may post to the Listserv or provide to Confluence staff to post in the library.

The Practitioner Advisor Program Membership Benefits

- Firm brand and summary description listed in public area of Confluence website
- Recognition among elite group of top firms in impact investing
- Ability to send one representative to each Annual Practitioners Gathering
- Participation in Confluence working groups
- Opportunity to propose annual conference sessions
- Subscription to Advisors’ Listserv
- Co-branding opportunities
- Larger sponsorship opportunities
- Potential speaking opportunities at Confluence events
JOIN THE PRACTITIONER INVESTOR PROGRAM

Confluence serves a wide spectrum of members, including those freshly committed to mission alignment, those working incrementally within institutions, and those who have achieved 100% mission alignment and are seeking to exercise sector-wide leadership. Practitioner Investor Members are diverse, ranging from small, focused, family foundations to some of the largest endowments leveraging capital in myriad ways.

Membership in The Practitioner Investors Program is open to philanthropic organizations, donor advised funds, single family offices, and high net individuals seeking to deepen their practice in mission-related investing by working collaboratively and strategically with other philanthropies. Practitioner Investors have already achieved general clarity about their MRI goals, and have developed organizational support—or a strong personal commitment—for their objectives.

Why join the Practitioner Investor Program?
The Program offers Practitioner Investors a peer-to-peer community through which they can share knowledge, construct ideas, deepen best practices, and foster collaboration.

Practitioner Investor Program Goals
• Build a community of experienced practitioners in mission-related investing
• Increase the capacity of Confluence practitioners through technical assistance, peer-to-peer learning, and collaboration
• Accelerate the field of mission-related investing by fostering systemic thinking, effective partnerships, and innovation within philanthropy

Benefits of Practitioner Investors Membership
Community
• Participation in a community of truly leading philanthropic grantmakers, donors, and public, private, community, and family foundations
• Priority registration to the 20+ webinars and in-person events Confluence organizes each year
• Speaking opportunities for Confluence webinars or events
• Join one of Confluence’s working groups
• Authentic collaboration among thought leaders in the field of mission-related Investing
• A pathway to leadership within Confluence, such as Board or Steering Committee participation

Resources
• One complimentary registration to the Annual Practitioners Gathering and membership pricing for additional representatives and family members
• Priority access to Confluence staff and services
• Access to topical membership listserves
• Membership discounts to investors’ events and consultant resources (when available)
• Individual technical assistance from Confluence’s CEO and senior staff
• Access to a community of practice that shares costs in building and maintaining collaborative funds
• Enjoy our exclusive Membership Library, featuring over 250 publications, resource guides, Confluence webinar recordings, and presentations

Become A Member of The Practitioner Investors Program!
Participation in the Practitioner Investors Program is based on a sliding scale by organizational asset size. Foundations and individual donors are welcome to apply for membership by contacting Dana Lanza, CEO, at dana@confluencephilanthropy.org or Hannah Erickson, Membership Cultivation & Development Manager, at hannah@confluencephilanthropy.org.
JOIN THE LEADERSHIP OF CONFLUENCE PHIANTHROPY!

Are you excited by the idea of building the field of mission-related investing? Would you like to collaborate with like-minded colleagues in your philanthropy work? Why not join one of Confluence’s leadership committees and help our diverse and committed membership translate learning and connection into concrete action?

The Confluence Board of Directors is currently recruiting member participation in the following committees:

- **Board of Directors** – Open to Practitioner Investors only
- **2018 Conference Committee** – Open to Practitioner Investors only until thematic content is selected
- **Membership Committee** – Open to Advisors and Practitioner Investors
- **Finance and Fundraising Committee** – Open to Advisors and Practitioner Investors

Recommend yourself or a colleague to serve, and help us lead Confluence into the future!

BOARD OF DIRECTORS

By providing vision, leadership, and accountability, the Board of Directors plays a vital role in ensuring that Confluence continues to build the field of mission-related investing and produce programs and services that meet the needs of our members. The Board works closely with the Confluence CEO and staff to ensure the operational impact and financial integrity of the organization. Board Members may serve two three-year terms. Confluence Board service generates significant rewards. Board members:

- Expand their awareness and deepen their knowledge of the field of mission-related investing;
- Help strengthen and broaden the impact of Confluence’s programs;
- Assist in building the field of mission-related investing by developing strategic initiatives and taking on leadership roles that further communication and collaboration;
- Develop beneficial and enjoyable relationships with philanthropic peers outside of their own programmatic and geographic scope.

Participation on the Board of Directors is currently open only to Practitioner Investors who are Members in good standing. To learn more about joining the Board of Directors please feel free to reach out to any of the current Board Members, or to Dana Lanza, our CEO.

CONFERENCE COMMITTEE

Conference Committee members assist in designing the plenaries, selecting speakers, and conducting outreach. Each committee member chooses a component of the conference that they would like to help with. This is a great way to become more involved with Confluence while meeting peers in the mission-related investing community.

FINANCE & FUNDRAISING COMMITTEE

The Finance and Fundraising Committee stewards fiscal management and fundraising at Confluence. The Committee meets three times a year and assists in strategizing fundraising efforts and managing the organization’s financial resources.
WELCOME INTENSIVE: AN INTRODUCTION TO IMPACT INVESTING
MARCH 13–14 SPECIAL PRE-CONFERENCE EVENT

The Welcome Intensive, led by professional advisors in a small group setting, is a two-day retreat style introduction to the concepts of impact investing. This program is designed for asset owners new to mission related investing and offers a unique opportunity to dive into the Confluence community with a cohort of new peers and allies.

The Intensive begins at 1:00 PM on Monday with a half-day training led by Patricia Farrar-Rivas (CEO, Veris Wealth Partners), Regan Pritzker (President, Libra Foundation), and Jeffrey Scheer (Director, Pathstone Federal Street). Special guests will lead workshops about fiduciary duty, talking to your investment advisors, and other topics of critical importance to new mission related investors. After this crash course in basic impact investing concepts and tools, participants will join the Tuesday morning workshops as a cohort in the conference’s Welcome Track.

Please note that this training is not suitable for investment professionals.

DAY ONE OF THE INTENSIVE:
MONDAY, MARCH 13

1:00 PM – BEAUREGARD
Welcome Address
Dana Lanza, CEO, Confluence Philanthropy

1:15 PM – BEAUREGARD
Group Introduction
We will use interactive exercises and individual sharing to get to know each other and form a learning cohort that will carry us through the conference.

2:00 PM – BEAUREGARD
A Brief History of Social Investing
While the practice of social investing is by no means a new concept, it has experienced exceptional growth in recent years. In this session, we will learn about the history and evolution of social investing, navigate the jargon (is it ESG, SRI, MRI, or impact?), and discuss the distinctions between practices. This will allow participants to clarify the types of investment strategies and tools that they might like to use.

3:00 – 3:15 PM
Break

3:15 PM – BEAUREGARD
Fiduciary Duty and the Role of the Trustee
There is a long-standing belief that the concept of fiduciary duty is an obstacle to mission-related investing. However, recent IRS guidance has provided a way for fiduciaries to better align investment portfolio and charitable purpose. In this session we will discuss what it means to be a steward of philanthropic assets, how to interpret the IRS code, and how to work with your investment team to design policy statements that work for everyone.

4:00 PM – BEAUREGARD
Accountability or Disruption? What’s Your Theory of Change?
Responsible investing strategies use tools to hold established corporations accountable and encourage best practices. Impact investing, on the other hand, tends to focus on causing disruption to the status quo by supporting place-based social enterprises and game-changing new companies. Impact investing can also include new products and services offered within existing companies, such as with publicly traded Tesla. While there is no right choice about which route to take, understanding your options is the first step. In this session we will explore these strategies in depth to help prepare you to craft your own personal theory of change through investing.

5:00 – 6:30 PM
Break

6:30 – 8:30 PM – DOMENICA
Welcome Intensive Dinner
(open to the Intensive cohort)

6:30 – 8:30 PM – BORGNE
Capacity Gratitude Dinner
(by invitation only)

All other attendees are encouraged to dine out in the French Quarter.
DAY TWO OF THE INTENSIVE:
TUESDAY, MARCH 14

The Cohort joins the Welcome Track throughout the morning, accompanied by workshop trainers Jeff Scheer and Patricia Farrar-Rivas.

WELCOME TRACK
Open to all Pre-Conference Attendees

7:30 AM – LA NOUVELLE ORLEANS & HOTEL LOBBY
Breakfast & Registration

9:00 AM – ROYAL D
The Foundation of Good Governance for Impact Investors
Organized by Cambridge Associates

To create the conditions for good governance, investors must assess whether they have the appropriate model in place for portfolio oversight and management; are upholding their fiduciary responsibilities; and are learning about peer best practices. Though this is true for any investor, incorporating social goals adds an additional layer of complexity to the process. What practices work well? Does the organization have the right division of roles and responsibilities? Has a policy been established that clarifies mission and goals? Is staff time efficiently allocated? In this session, representatives from both foundations and families share their perspectives on what has worked well—and what hasn’t—in their respective organizations.

Speakers:
• Erin Harkless, Senior Investment Director, Cambridge Associates (Moderator)
• Berit Ashla, Vice President, Rockefeller Philanthropy Advisors
• Kristin Hull, Director, Nia Community Fund
• Shuaib Siddiqui, Director, Mission Related Investment, Surdna Foundation

9:55 AM – ROYAL D
After You Hire Your Mission-Related Investing Advisor: Best Practices in Investment Committee- Advisor Relationships
Organized by Jessie Smith Noyes Foundation

Investment committees working in mission related investing need to adapt their traditional relationship models with their advisors. Once your investment committee has hired a mission related investing advisor, how can you optimize your relationship to create the most impact? How can a committee best articulate its mission investing goals to its advisor? What are some best practices for committees to utilize in working with advisors to surface mission related investing opportunities and build good relationships over the long term? What role should committee members play in sourcing investment ideas? How much discretion should your committee give the advisor? This session encourages honest and open discussion of how foundations and asset owners have had both good and bad relationships with investment advisors. The session offers actionable tips to help assets owners build better relationships with their advisors.

Speakers:
• Steven Godeke, Trustee, Jessie Smith Noyes Foundation; Founder, Godeke Consulting
• Wendy Holding, CFA, The Domini Sustainability Group of Loring, Wolcott & Coolidge
• Beatrice Stern, President, Ralph E. Ogden Foundation

10:50 – 11:05 AM
Break

11:05 AM – ROYAL D
Engaging the Boards: How to be Effective Shareholders with Positive Impacts on Sustainability
Organized by Rockefeller & Co.

Corporate governance is the critical third element of environmental, social, and governance (ESG) investing in public markets. It ensures the transparency and accountability of companies and allows shareholders to engage with their boards to improve corporate sustainability practices. Investors are increasingly demanding greater responsiveness from boards and seeking ways to engage with them directly on a wide range of issues, including diversity, human rights, executive compensation, and climate change. This session explores best practices and case studies in engaging boards towards better governance for sustainability.

Speakers:
• Mariela Vargova, Senior Vice President, Sustainability and Impact Investments, Rockefeller & Co. (Moderator)
• Laura Campos, Director, Corporate and Political Accountability, Nathan Cummings Foundation
• Sonia Kowal, President and Director of Socially Responsible Investing, Zevin Asset Management
PRACTITIONER INSTITUTE TRACK
Open to Confluence Practitioner and Advisor Members Only

7:30 – 9:00 AM – ROOM TBA & Hotel Lobby
Breakfast & Registration

9:00 AM – ROOM TBA
Keynote: Kate Wolford, President, The McKnight Foundation
Open to Practitioner and Advisor Members Only

Kate Wolford is president of the McKnight Foundation, a Minnesota-based family foundation that seeks to improve the quality of life for present and future generations through grantmaking, collaboration, impact investing, and strategic policy reform. In 2015, the Foundation had assets of $2.2 billion and granted more than $88 million in the areas of the arts, education and learning, Midwest climate and energy, Mississippi River water quality, the Minneapolis/St. Paul region and communities, agricultural research, and neuroscience research. Kate has led the McKnight Foundation since 2006, spearheading the development of the Foundation’s climate mitigation and sustainability efforts, including its impact investing program. During her tenure, McKnight has earmarked $200 million for higher impact investments; developed a new lower carbon investment product; and promoted impact investing among grantmaking staff.

10:00 AM – ROOM TBA
Practitioners Institute: What’s Love Got to Do with It?
Aligning our Values to Build a Sustainable, Inclusive America
Open to Practitioner and Advisor Members Only

In this opening session for Practitioner and Advisors Members we will explore this transitional moment, how we find ourselves here and the ways in which we respond. Significantly, this is a discussion among impact investors, a community of influential individuals and mission-driven institutions with unique roles to play as private investors, philanthropists, and progressive investment managers. This session features the voices of Confluence members along the impact spectrum from concessionary to market rate investing, allowing time for community discourse about how we can become stronger, more cohesive investors across issue areas to build a sustainable, more inclusive America. Discussion will focus around social integration, jobs, climate, and healthcare. Much of this year’s Practitioners Institute will provide time for Members to share in a large-group facilitated format.

Practitioners Institute: Keynote: David Simas, CEO, The Obama Foundation & Obama Presidential Center
David Simas, CEO, The Obama Foundation & Obama Presidential Center

David Simas is Director of The Obama Foundation. Prior, he served as the Assistant to the President and Director of the Office of Political Strategy and Outreach. He worked closely with senior advisors David Axelrod and David Plouffe, in these capacities. He also acted as Director of Opinion Research for President Obama’s re-election. Before moving to Washington DC, David served as Deputy Chief of Staff to Massachusetts Governor Deval Patrick. David joins us at this year’s Practitioners Institute to share his perspectives and to engage in an interactive dialogue about how we move forward in fostering the integration of newly arrived immigrants, his insights about the healthcare crisis, and how we can continue to work together to address climate change.

Facilitated Discussion
Speakers:
  • Fatima Angeles, Vice President of Programs, The California Wellness Foundation
  • Lisa Hayles, Vice-President, Institutional Investment Services, Boston Common Asset Management
  • Sandra Mikush, Co-Founder, Just Transition Fund
  • Joohee Rand, Vice President for Community Investment and Strategy, Santa Fe Community Foundation
  • Tracy Russ, Principal, SOLID (Facilitator)
  • Morgan Simon, Managing Director, Pi Investments
  • Terry Tamminen, CEO, Leonardo DiCaprio Foundation

12:00 – 12:15 PM
Break

12:15 PM – OFFSITE
Special Luncheon with David Simas
David Simas, CEO, The Obama Foundation & Obama Presidential Center (by invitation only)
Board Buses for Field Trips

**FIELD TRIPS & OFF-SITE SESSIONS**

*Pre-registered Attendees Only*

12:15 PM – GATHER IN HOTEL LOBBY

**Field Trip: Affordable Housing in the Aftermath of Katrina**

*Sponsored by Gray Matters Capital*

Along with other American cities, New Orleans is experiencing dramatic demographic changes that make affordable housing increasingly scarce. At the same time legacies of discrimination in housing policy and urban design continue to impact vulnerable residents. The catastrophic 2005 Hurricanes Katrina and Rita added to the housing crisis in New Orleans, which is struggling to make its housing recovery truly equitable. However, the upheaval has also led to the emergence of innovative solutions.

Join local experts on a tour that explores the different approaches in supporting and improving affordable housing in New Orleans, from impactful policy advocacy to unique financing models for real estate development.

**Speakers:**
- Anna Cable, Innovation and Business Development Lead, Gray Matters Capital
- Reverend Willie Calhoun, local affordable housing advocate and community leader
- Andreanecia Morris, Executive Director, HousingNOLA
- David Sand, Chief Investment Strategist & Chief Impact Investment Officer

**Field Trip: Building Community Resilience in the Face of Sea Level Rise**

*Kayak Expedition – Weather Permitting*

There may be no other place in the lower 48 where climate change is more visible than the Mississippi Delta. Due in large part to the over-engineering of the Mississippi River, Louisiana’s diminished wetlands have left urban areas more vulnerable to extreme weather while some communities are literally already sinking. As sea levels rise and threaten coastal communities around the world, this trip will provide a firsthand look at the environmental features and wildlife that are on the front lines. Participants will kayak through mesmerizing, forested swampland that will give outdoors enthusiasts a unique opportunity to see Louisiana’s beautiful but highly fragile natural ecosystems up close, while learning about efforts to invest in local resilience. Paddling through the bayou wilderness will give participants new appreciation for the visible urgency of climate change, its effects on our natural systems, and innovative approaches to addressing this concern on local and global scales.

**Speakers:**
- Drew Jones, Co-Director, Climate Interactive
- Bob Marshall, Pulitzer Prize-winning Journalist, The Lens
- Mark Spalding, Executive Director, The Ocean Foundation
- Kristin Tracz, Program Officer, Walton Family Foundation

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**Field Trip: Supporting Local Economies through Sustainable Food**

*Bike Tour – Weather Permitting*

Fishing and seafood are at the very heart of Louisiana’s fascinating history, rich culture, and delicious cuisine. Since the tragic impacts of Hurricane Katrina local leaders and community investors have joined forces to revitalize the community by building an innovative place-based pipeline for food entrepreneurs. On this bike tour, participants will make the first of two stops at the renowned Roux Carre: “Food Port of New Orleans,” an accelerator for emerging food-preneurs and a showcase for up-and-coming performing and visual artists. Participants will choose lunch from the vendors representing the African American, Caribbean, and Latin American influences on New Orleans culture. Then, bikers will head to Propeller: “A Force for Social Innovation,” a nonprofit dedicated to driving social, environmental, and economic impact in New Orleans by incubating social entrepreneurs with the potential to solve the city’s most pressing issues. Join us as we jump into New Orleans belly first!

**Speakers:**
- Andrea Chen, Executive Director, Propeller
- Lisa Renstrom, Trustee, Bonwood Foundation and Board Chair, Confluence Philanthropy
- Jeff Rosen, Chief Financial Officer, Solidago Foundation
- Emery Van Hook Sonnier, Director, The Link Stryjewski Foundation
- Linda Usdin, Board Chair, Propeller

**Field Trip: The Legacies of Slavery: The Prison Industrial Complex and Human Trafficking**

After 1808, New Orleans became the largest slave market in America; there are 52 known slave auction sites in the heart of downtown. The legacy of slavery and racism persists: Louisiana incarcerates more people than any other state. This field trip offers a guided tour of the Whitney Plantation, the only plantation museum in Louisiana with a focus on slavery. The tragic impacts of Hurricane Katrina local leaders and community investors have joined forces to revitalize the community by building an innovative place-based pipeline for food entrepreneurs. On this bike tour, participants will make the first of two stops at the renowned Roux Carre: “Food Port of New Orleans,” an accelerator for emerging food-preneurs and a showcase for up-and-coming performing and visual artists. Participants will choose lunch from the vendors representing the African American, Caribbean, and Latin American influences on New Orleans culture. Then, bikers will head to Propeller: “A Force for Social Innovation,” a nonprofit dedicated to driving social, environmental, and economic impact in New Orleans by incubating social entrepreneurs with the potential to solve the city’s most pressing issues. Join us as we jump into New Orleans belly first!

**Speakers:**
- Shawn Ginwright, Trustee, The California Endowment (Co-Facilitator)
- Leslie Lowe, Program Officer, Rockefeller Family Fund (Co-Facilitator)
Pre-Conference Agenda

Offsite Session: An Uncommon Conversation: Shift The Culture - Change The Game
Organized by Veris Wealth Partners

We are in an unprecedented moment of change, one where creative and cultural social impact strategies are igniting more citizens than ever before. Yet, even with the best intentions, the practices of impact investing and philanthropy have the potential to perpetuate the very dynamics they seek to transform. How does culture influence the way we approach impact investing and philanthropy? Are there social impact innovations happening that we are unaware of? Can cultural strategies strengthen our ability to BE the change? Do we have a responsibility to become more conscious in how we shape and mold these times? Welcome to an Uncommon Conversation. Enjoy a New Orleans gourmet feast, prepared by Chef Linda Green, and authentic participatory dialogue with renowned artists and activists, Jessica Norwood (Founder, Runway Project), Rha Goddess (Founder, Move the Crowd), Zella Palmer (Dillard University’s Ray Charles Program in African-American Material Culture), and Big Chief Clarence Delcour (New Orleans Black Indians Alliance).

Speakers
- Big Chief Clarence Delcour, Co-Founder, New Orleans Black Indians Alliance
- Patricia Farrar-Rivas, CEO, Veris Wealth Partners
- Rha Goddess, Founder & CEO, Move the Crowd
- Linda Green, Owner & Chef, Soul Food Catering Company
- Jessica Norwood, Fellow, Nathan Cummings Foundation & Founder, Runway Project
- Brandon “Bmike” Odums, Local Artist & Filmmaker
- Zella Palmer, Chair, Ray Charles Program in African-American Material Culture, Dillard University

Special Guest:
- Myesha Francis, Local Artist
- Michele Jean Pierre, Executive Director, Ellis Marsalis Music Center

Session site and co-host:
Dillard University’s Ray Charles Program in African-American Material Culture

5:00 – 5:30 PM
Return from Field Trips

5:30 – 6:30 PM
Free Time

6:30 PM – RIVERVIEW ROOM (Rooftop)
WELCOME RECEIPTION
All Guests Registered for the Conference Welcome
Music provided by Dr. Jazz and the New Orleans Sounds.

7:30 PM – LA NOUVELLE ORLEANS Dinner
All Guests Registered for the Conference Welcome
Opening Night Welcome Address by Mark Spalding, President, The Ocean Foundation, Flozell Daniels, CEO & President of the Foundation for Louisiana, and Daniel DeSilva, Wildman of the Flaming Arrows Mardis Gras Indians Tribe.

“Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change that we seek.”

– President Barack Obama
WEDNESDAY, MARCH 15

7:30 – 8:30 AM – LA NOUVELLE ORLEANS
Breakfast & Registration

7:30 AM – LA NOUVELLE ORLEANS
Active Owners Working Group Breakfast Discussion
Sponsored by Trillium Asset Management

Please join members of Confluence Philanthropy’s Active Owners Working Group to discuss the latest issues in political accountability and corporate transparency. The 2016 elections, both local and national, shed light on the intersection of money and the political process. This breakfast is an opportunity to reflect on our role as impact investors and to identify the tools at our disposal. We’ll discuss how to move forward as a community and work to highlight some themes for the coming year.

Speakers
• Allison Barlow, Program Director, Democracy and Media, Wallace Global Fund (Facilitator)
• Liz Kennedy, Director, Democracy and Government Reform, Center for American Progress
• Matt Patsky, CEO, Trillium Asset Management

8:30 – 8:45 AM
Break

8:45 AM – LA NOUVELLE ORLEANS
Board Welcome: Lisa Renstrom, Confluence Philanthropy Board Chair, and Director, Bonwood Foundation

9:00 AM – LA NOUVELLE ORLEANS
Plenary: Financing a New Economy: Can Social Equity be an Impact Theme?

As social justice and the battle against inequality become more important themes in philanthropy, how can these goals be translated into mission-related investing opportunities? What are the specific ways that social equity can be advanced through investments by a foundation’s endowment? This powerful opening session provides real world examples that are serious about scale and realistic about the challenges this work faces.

Speakers
• Flozell Daniels, President & CEO, Foundation for Louisiana
• Daryn Dodson, Consultant to the Board of Directors, Calvert Funds
• Genaro Lopez-Rendon, President, Jessie Smith Noyes Foundation (Moderator)

10:30 AM – LA NOUVELLE ORLEANS
Community Reflections

Facilitated by Dana Lanza, CEO, Confluence Philanthropy and Jeff Rosen, Vice Chair, Confluence Philanthropy and Chief Financial Officer, Solidago Foundation

Join us for what has become a Confluence tradition and offer your reflections on the field in an open forum sharing session. Bring an idea, inspiring quote, or a short poem to share!

11:00 – 11:15 AM
Break

11:15 AM – LA NOUVELLE ORLEANS
Keynote: Dr. Jane Goodall, DBE, Founder, The Jane Goodall Institute
Bruce Kahn, Board Member, Confluence Philanthropy, and Trustee, Robert & Patricia Switzer Foundation

In July 1960, Jane Goodall traveled from England to what is now Tanzania and bravely entered the little-known world of wild chimpanzees. She was equipped with nothing more than a notebook, a pair of binoculars, and her unyielding patience and characteristic optimism. She won the trust of these shy creatures and managed to open a window into their sometimes strange and often familiar lives. Today, Jane’s work revolves around inspiring action on behalf of endangered species, particularly chimpanzees, and encouraging people to do their part to make the world a better place for people, animals, and the environment we all share. The Jane Goodall Institute works to protect the famous chimpanzees of Gombe National Park in Tanzania, with a comprehensive approach that addresses the needs of local people who are critical to chimpanzee survival. Jane Goodall’s pioneering work in environmental education and community-based conservation has grown to 150,000 members in more than 130 countries. In 2002 she was honored to become a “Messenger of Peace” by The United Nations. Jane will join us to share her impassioned vision about the importance of conservation and building resilient ecosystems for habitat preservation.

12:15 PM
Lunch over Ad Hoc Discussions

12:15 PM – CATHEDRAL ROOM
Special Luncheon with Jane Goodall (By Invitation Only)

12:15 PM – ROOM TBA
Special Luncheon: The Rainmakers Investment Collaborative
Join Confluence Members to learn about The Rainmakers Investment Collaborative. Rainmakers used a consensus-based process to craft a collaborative PRI initiative that benefits Pueblo, Navajo, Hopi, and Apache communities throughout New Mexico and Arizona. Below market rate loans and grants are made for sustainable community development, tribal social enterprise, agriculture, and affordable housing. This luncheon will share the Rainmakers story and offer the opportunity to learn more about participating in the Collaborative. Organized by Confluence Philanthropy.

Speakers
- Dave Castillo, CEO, Native Capital Access, Rainmakers Deal Sourcing
- Stanley Keasing, CEO, Rural Community Assistance Corporation and Rainmakers Investment Manager
- Jeff Pace, CFO, The Christensen Fund and Confluence Board Member (Facilitator)

1:30 PM
Concurrent Sessions (Choose one)

ROYAL B
Accelerating Innovation through Collaboration: The Impact Terms Project
Organized by Pi Investments

Smart people and organizations are experimenting with innovations in impact capital deal structures and terms. These innovations range from structured exits to pay-for-success, from impact funds to holding companies. Experiments with new structures and terms, unfortunately, often occur in isolation, and it can take years for new ideas to reach a broad audience. The Impact Terms Project was launched to accelerate the pace of innovation in deal structures and terms by establishing a collaborative process supported by leading organizations in the impact investing field. With this process, deal data is collected from investors and entrepreneurs, the data is analyzed to identify innovations and trends, and emerging practices are then shared with the larger community. This session explores how the collaboration is developing, including what’s working and what the challenges are.

Speakers
- John Balbach, Program Officer, MacArthur Foundation
- Aner Ben-Ami, Co-Founder & Managing Partner, Pi Investments
- Bruce Campbell, CEO, Blue Dot Advocates (Moderator)
- Carolina Henriquez Schmitz, Legal Manager, Thomson Reuters Foundation

ROYAL C
Tales from the Fire: Building the Infrastructure for Place-Based Investing
Organized by The Russell Family Foundation

This year’s Tales from the Fire conference session shares the story of The Canopy Project, a visionary collaborative of foundations in the Pacific Northwest designed to build an ecosystem for local place-based investing. Although the project is in transition, some of Canopy’s founders and partners join us this year to share their story. Focused discussion centers around the successful elements of the project, from its innovative training model to multi-stakeholder design and deal flow mapping. Panelists will also share lessons learned, what ultimately did not work, and next steps.

Speakers
- Sayer Jones, Director of Mission Related Investing, Meyer Memorial Trust and former Canopy Board Member
- Craig Muska, Founding President, Canopy
- Kathleen Simpson, Chief Financial Officer, The Russell Family Foundation (Moderator)
- Richard Woo, CEO, The Russell Family Foundation

ROYAL SALON
Investing in a Woman’s Right to Choose
Organized by The Educational Foundation of America

A woman’s right to choose her own reproductive path is crucial to her resilience. Through its grantmaking, The Educational Foundation of America has long supported a woman’s ability to control her own reproductive health by ensuring access to safe, legal abortion and contraception. Investors and foundations are currently exploring the use of an entire suite of financial tools to support this access, including impact investing through pooled funds that provide low interest loans to abortion clinics; shareholder activism to ensure that companies cover reproductive health services for their employees; and refinancing debt and extending lines of credit. In this panel, experts in investing through a gender lens will invite you to think more broadly about the impact that your investments can have in the world.

Speakers
- Melissa Beck, – Executive Director, The Educational Foundation of America (Moderator)
- Suzanne Biegel, Founder, Catalyst at Large
- Bonnie Scott Jones, Senior Policy Advisor, Advancing New Standards in Reproductive Health
- Ruth Shaber, MD, President, Tara Health Foundation

CABILDO
How Far We’ve Come: What Can Be Learned from the Fossil Fuel Divest-Invest Movement
Organized by Threshold Group

In this session we will address the key success factors, ongoing challenges, and evolving makeup of Divest-Invest signatories. Our goal is to surface key lessons that foundations, impact investors, and advocacy organizations can use as they consider ways to catalyze capital markets to tackle other social and environmental challenges. A prime example is criminal justice reform and the screening out of prison labor in a similar divest-invest approach. Join us to further expand the discussion.
Speakers
- Stephanie Cohn Rupp, Managing Director, Impact Investing, Threshold Group (Moderator)
- Ellen Friedman, Executive Director, Compton Foundation
- Paula Goldman, Vice President, Omidyar Network
- Bill McKibben, Founder, 350.org and Schumann Distinguished Professor in Residence, Middlebury College (via videoconference)

ROYAL A
Advancing Impact through the UN Sustainable Development Goals (SDGs)

The UN adopted an expansive and ambitious set of 17 development goals (SDGs) aimed at ending poverty in all its forms by 2030, to be accomplished by addressing a range of issues including armed conflict, climate change, and inequality. Analysts estimate that achieving these goals could cost as much as $4.5 trillion per year, with an estimated funding gap of about $2.5 trillion per year that would need to be financed by private investment. However, it can be challenging to align investors interested in addressing the SDGs with actual needs on the ground, and to connect investors to the right set of partners for an opportunity. Hear from a group of impact investors and asset owners who are creating new frameworks for impact investing by aligning their networks’ efforts to the SDGs. They’ll show you how to get it done!

Speakers
- Patrick Briaud, Philanthropic Advisor, Rockefeller Philanthropy Advisor (Moderator)
- Adam Bendell, CEO, Toniic
- Ellen Dorsey, Executive Director, Wallace Global Fund
- Raúl Pomares, Founder, Sonen Capital

ROYAL D
The Most Tremendous Legal Strategies, Believe Us

The whirlwind of executive orders from the new President’s administration has spun traditional governance on its head, and impacted groups are understandably struggling to keep pace with the changes. When faced with these challenges, impact investors are compelled to take a proactive stance by investing in the world that we want to live in — one that is sustainable and where everyone is welcome. Protecting a safe regulatory environment for investors will be critical to making progress, and legal strategies can serve as both an immediate stopgap and a long-term path to defend immigrants, climate frameworks, and corporate regulations that support investors’ rights and responsibilities. Join a discussion with legal experts to gain perspective about the role of the courts and what mission-related investors can do to support those working in the legal system on a range of issues.

Speakers
- Allison Barlow, Program Director, Democracy and Media, Wallace Global Fund (Moderator)
- Richard Saines, Partner, Baker & McKenzie LLP
- Naomi Tsu, Deputy Legal Director, Immigrant Justice Project, Southern Poverty Law Center

2:45 PM
Free Time (Don’t go too far! You only have 75 minutes to the Keynote session!)
Refreshments sponsored by Cambridge Associates

4:00 PM – LA NOUVELLE ORLEANS
Evening Keynote: James Hansen, Professor, Columbia University’s Earth Institute
Welcome by Molly Betournay, Director of ESG and Impact Investing, Pathstone Federal Street

Dr. James Hansen, former Director of the NASA Goddard Institute for Space Studies, is Adjunct Professor at Columbia University’s Earth Institute, where he directs the program on Climate Science, Awareness and Solutions. Best known for his 1980s testimony on climate change that helped draw awareness to the issue of global warming, Dr. Hansen is recognized for speaking truth to power and outlining actions needed to protect the futures of young people and all species on the planet.

5:00 PM – LA NOUVELLE ORLEANS
Evening Plenary: Investing in Climate Resilience: Raising All Ships
Refreshments and Adult Beverages will be Available

Earlier this year, reports cited that investments of $12.1 trillion must be made into new renewable energy generation over the next 25 years if we are to limit global temperature increase to less than two degrees Celsius. This report came

Intentaron enterrarme, pero no sabían que soy una semilla.

They tried to bury me, but didn’t know that I’m a seed

— Mexican proverb
on the heels of COP21, in which developed countries pledged $100 billion per year in climate funding through 2020. There clearly exists an opportunity and need for investors to focus on investments in renewable energy and energy efficiency; however, climate proofing portfolios need to extend far beyond clean technology and infrastructure investment, to also include a focus on climate resilience and adaptation. This session will explore what the ripple effects of climate change will truly look like and the adaptation and investment needed to properly prepare for them.

Speakers:
- Barbara K. Buchner, Executive Director, Climate Finance, Climate Policy Initiative (Moderator)
- Adam Davis, Managing Partner, Ecosystem Investment Partners
- Jeff Hebert, Deputy Mayor, Chief Resilience Officer, City of New Orleans
- Alex Kaplan, Senior Vice President, Swiss Re
- Robert Sanders, Senior Finance Director, Clean Energy Group

6:30 – 6:45 PM
Break

6:45 PM – ROYAL ROOMS
Toast to the Impact Advisors
Join us in raising a glass to recognize those impact investment advisors that were featured in Confluence Philanthropy’s 2016 publication, Finding Your Way to the Right Impact Investing Advisor: A Resource Guide, and other special individuals this year.

7:00 PM
Second Line Parade to the Louisiana Museum
Music provided by Kinfolk Brass Band
Depart from Hotel Monteleone
Read about this quintessential New Orleans experience on page 7.

7:30 PM
Networking and Dinner at the Louisiana Museum with Invited Guests

THURSDAY, MARCH 16

7:30 – 8:45 AM – LA NOUVELLE ORLEANS
Breakfast over Ad Hoc Discussions

8:45 AM – LA NOUVELLE ORLEANS
Morning Introduction: Jameela Pedicini, Director, Perella Weinberg Partners

9:00 AM – LA NOUVELLE ORLEANS
Advisor Keynote: Sister Patricia Daly, OP, Director Emeritus, Tri-State Coalition for Responsible Investment

Patricia Daly, OP is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for 40 years. She serves as the Director Emeritus of the Tri-State Coalition for Responsible Investment after 23 years as Executive Director. With members of the Interfaith Center on Corporate Responsibility, Pat has worked with companies on issues of human rights, labor, ecological concerns, militarism, equality, health and tobacco, and international debt and capital flows. Pat has played a role in forcing General Electric to pay for a clean-up of the Hudson River, and since the late 1980s has been instrumental in placing climate change on the agendas of companies, especially in the utility, auto, and oil and gas sectors. Sister Pat is the recipient of the 2014 Joan Bavaria Award, presented by Ceres and Trillium Asset Management. Pat serves on the Advisory Board of the Lamont Doherty Earth Observatory at Columbia University and the Earth Council of the Dominican Sisters.

9:50 AM – LA NOUVELLE ORLEANS
Plenary: Reimagining Capitalism: The Path Towards Sustainable Value Creation

What will capitalism look like in 2050? Shifting demographics, technological advances, natural resource availability, climate risk, and evolving social values are redrawning the investment landscape. The confluence of these trends will change the needs, requirements, and behaviors of investors and stakeholders alike. Against this backdrop, an increasing number of forward-looking organizations, individuals, and policymakers are questioning the long-term viability of today’s dominant form of capitalism and examining the purpose of capital in a healthy and sustainable economy. Broadly advocating for a paradigm shift by reforming capital markets to address real social, economic, and business needs, these visionaries are proposing values-based advancements to the current system. This panel will discuss how innovators are reimagining capitalism, the short-term implications of their actions, and how others can follow suit.
AGENDA

Speakers
- Greg Nelson, Parker Media and the Parker Foundation, Fellow, Aspen Institute Future of Work Initiative (Moderator)
- Danielle Beavers, Diversity and Inclusion Director, The Greenlining Institute
- John Goldstein, Managing Director, Goldman Sachs Asset Management
- Susan Mac Cormac, Partner, Morrison & Foerster
- Aaron Walker, Founder & CEO, Camelback Ventures
- Steve Howard, Former Chief Sustainability Officer, IKEA Group

11:05 AM LA NOUVELLE ORLEANS

Special Announcements
- Finance for Social Change
  Ellen Dorsey, Executive Director, Wallace Global Fund
- The Climate Solutions Challenge Announcement
  Dana Lanza, CEO, Confluence Philanthropy and Jason Scott, Co-Managing Partner, Encourage Capital

11:15 – 11:30 AM

Break

11:30 AM

Concurrent Sessions (Choose one)

ROYAL B
Impact Investing in Immediate Disaster Recovery Work
Organized by Community Capital Management

Katrina is unfortunately only one example of a natural disaster that necessitated an all-hands-on-deck response from local and national foundations and investment managers. Impact investors with well-developed policies and procedures for grant, PRI, and investment decisions often are forced to throw out their playbook when disaster strikes. Panelists will share examples from response efforts around the country and talk about how to be prepared for the unexpected before it occurs. Discussion will focus on the need for and creation of new investment products to build preparedness for these events.

Speakers
- Liza Cowan, Executive Director, JPMorgan Chase & Co.
- Robert Ottenhoff, CEO, Center for Disaster Philanthropy
- David Sand, Chief Investment Strategist, Community Capital Management (Moderator)
- Michelle Whetten, Vice President, Enterprise Community Partners

ROYAL D
LGBT Corporate Engagement by Mission-based Investors: A Case Study in Leveraging Assets
Organized by Clean Yield Asset Management

A small number of LGBT mission-based foundations, working both independently and in collaboration with impact investment management firms, have been pursuing complementary advocacy and engagement strategies to positively impact corporate behavior on LGBT issues. Their efforts have been very successful, resulting in workplace policy improvements at an estimated 200 corporations. The panel will offer insights into the strategies, methods, and experiences of these grantors and asset managers, even as the movement struggles to secure its gains against new forms of backlash and address discrimination faced by LGBT people worldwide.

Speakers
- Shelley Alpern, Director of Social Research & Advocacy, Clean Yield Asset Management (Moderator)
- Kris Hermanns, CEO, Pride Foundation
- Matthew Patsky, CEO, Trillium Asset Management
- Tim Smith, Director of ESG Shareowner Engagement, Walden Asset Management

CABILDO
Truth, Marketing, and Gaming the System: The Ecosystem of ESG
Organized by Aperio Group

In this session, we will explore the ESG data that managers, advisors, consultants, and asset owners rely on to make appropriate investment decisions in alignment with their values and missions. While data has improved dramatically over the past decade, it is still not perfect. To use the data that does exist wisely, it is necessary to understand the ecosystem. In this session we will ask: Where do ESG ratings meet the ideal and where do they fall short? What is the relationship between ratings and improved investment decision-making? What role do ratings play in improving sustainability or any other issue that ratings target? Is the marketplace successfully addressing the quality and utility of ratings? Can sustainability issues be broadly incorporated
into investment decisions without ESG ratings playing a major role? Can companies significantly improve their sustainability performance without ratings?

Speakers
• Mark Bateman, Director of SRI/ESG Research, Aperio (Moderator)
• Julie Gorte, Senior Vice President for Sustainable Investing, Pax World Management
• Vanessa Tucker, Vice President for Analysis, Freedom House

ROYAL A  
Green Investments Matter  
Organized by Tamalpais Trust

Utility-scale renewable energy generation in developing countries has the potential to foster social, environmental, and cultural development while lowering the cost of electricity. However, structural inequalities and powerful perverse incentives render rural and indigenous communities acutely vulnerable to abuse and violation of their rights. The resulting social risk often materializes in conflict, cost overruns, and project failures. Institutional Environmental, Social, and Governance (ESG) safeguards are failing to effectively mitigate these obstacles. Comprehensive risk mitigation is essential to attracting clean energy investment, particularly from institutional investors. In this session, we’ll analyze the challenges that conventional utility-scale green energy developments pose to both investors and local communities. Panelists will share creative alternative approaches mitigation that increase the social value and resilience of renewable energy projects, including enhanced due diligence; alternative project development models; and collective leadership and governance with effective participation of indigenous and other vulnerable communities.

Speakers
• Jen Astone, Executive Director, Swift Foundation (Co-Moderator)
• Jaune Evans, Executive Director, Tamalpais Trust (Co-Moderator)
• Winona LaDuke, Executive Director, Honor the Earth
• Sergio Oceransky, Founder and Co-Director, Yansa CIC
• Nashieeli Valencia Núñez, Member, Articulation of Indigenous Peoples of the Isthmus of Tehuantepec in Defense of the Territory

ROYAL C  
Geoengineering: The Good, the Bad, and The Unknown  
Organized by The V. Kann Rasmussen Foundation

Climate engineering (also often referred to as climate geoengineering or simply geoengineering) is defined as large-scale, deliberate intervention in Earth systems to counteract climate change. Whether involving the removal of carbon dioxide from the atmosphere, or cooling of the planet via schemes to reflect incoming solar radiation, a range of technological options are now receiving ever greater attention from funders, governments, and the scientific community. Climate engineering could become an important component of humanity’s response to climate change. There are also, though, a range of potent risks and potential downsides.

This session is a unique opportunity to hear from a leading expert in the field. Join Simon Nicholson, director of the Global Environmental Politics program in the School of International Service at American University and co-director of the Forum for Climate Engineering Assessment, for a clear-eyed look at a wild new frontier of climate action.

Speakers:
• Irene Krarup, Executive Director, The V. Kann Rasmussen Foundation (Moderator)
• Simon Nicholson, Assistant Professor and Director, Global Environmental Politics Program, School of International Service at American University

12:45 PM – LA NOUVELLE ORLEANS  
Lunch over Ad Hoc Discussions

12:45 PM – RIVERVIEW ROOM  
Special Luncheon: Protecting the Protectors – Impact Investing for Indigenous Communities

In this special luncheon session we will have a facilitated discussion in response to updates about the challenges and opportunities facing Indigenous communities in the United States and internationally. We will also make available member-supported Confluence publications that provide tools and resources to help with pro-Indigenous community impact investment strategies. This is a great place to meet colleagues who share your passion for supporting Native Peoples, conservation, divestment, and more!

Discussion Facilitators
• Andrea Nemtin, President and CEO, InSpirit Foundation (Moderator)
• Martin von Hildebrand, Director and Founder, Gaia Amazonas
• Lorenzo J. De Rosenzweig Pasquel, Executive Director, Fondo Mexicano para la Conservación de la Naturaleza and Board Member, Confluence Philanthropy

2:00 PM – LA NOUVELLE ORLEANS  
Confluence Membership Meeting and New Advisor Program Announcement (Members only)

Join Confluence Philanthropy’s Board and staff to hear about the year ahead, ask questions, and share your ideas. A special announcement about the expansion of the Advisor Membership Program will be shared.
POST CONFERENCE EVENTS

Open Networking over coffee and refreshments until 5:00 PM.

WORKING GROUPS & MEETINGS

3:00 PM ROYAL D
Climate Solutions Collaborative (C2C): Comparing Risk Assessments

Fund managers must evaluate a variety of risks to determine the strength and position of their impact investment decisions, and there is no greater or more multidimensional risk than climate change. Environmentally, economically, and socially, climate change poses a significant issue for investors. How can such risks be measured and accounted for in the portfolio, and what upsides and opportunities exist alongside these risks? Recent reports have examined specific and projected impacts of climate change on investment strategies; in this work session for C2C, the Climate Solutions Collaborative, we will compare recent findings. Research from two firms whom have made climate risk assessment a priority will be considered as we examine how investors can take clear-eyed and opportune action given the realities of our changing climate.

Speakers
• Ilmi Granoff, Director, Sustainable Finance, ClimateWorks Foundation (Co-Moderator)
• Rob Davenport, Managing Partner, Brightpath Capital Partners (Co-Moderator)
• Alex Bernhardt, Principal, Head of Responsible Investment (US), Mercer Investments
• Jessica Matthews, Head of Mission-Related Investing Practice, Cambridge Associates

ROYAL B
Divest-Invest Philanthropy

Divest-Invest Philanthropy is a network of over 150 foundations that are leading members of the broader divest-invest change movement. Their collective efforts are driving powerful, system-wide changes in global financial markets and accelerating the transition away from fossil fuels and toward a sustainable clean energy economy. This session provides updates about developments in divest-invest, shares case studies of investing in the new energy economy, and offers a mapping activity to explore what role you can play in supporting this important work.

Speakers
• Ellen Dorsey, Executive Director, Wallace Global Fund
• Nick Eisenberger, Steering Committee Member, The Climate Solutions Collaborative

ROYAL C
Transform Finance: Using Impact Investing for Transformative Change

As impact investing moves to the mainstream of finance, a new pressing question arises for foundations and other asset owners: besides specific interventions, are we pursuing an investment strategy that helps re-define who wins or loses in our economy? In light of the palpable economic discontent at the heart of political turmoil, this session will focus on how the Transform Finance community is analyzing the intersection of broader trends in social change and capital allocation decisions. We will review how the Transform Finance Investor Network – a $2 billion community of investors working for social justice – is finding new opportunities for 100% portfolio alignment for transformative change by looking at how Pi Investments is applying a social justice thesis to the entire portfolio. This session is especially geared toward foundation program officers and investment officers looking at strategies to deepen the impact of their assets.

Speakers
• Andrea Armeni, Executive Director, Transform Finance
• Aner Ben Ami, Managing Director, Pi Investments, and Board Member, Transform Finance
• Morgan Simon, Managing Director, Pi Investments, and Co-Founder and Chair, Transform Finance

Friends show their love in times of trouble, not in happiness.
– Euripides
SPEAKERS BIOGRAPHIES (A-B)

CONFERENCE SPEAKERS

Shelley Alpern
Shelley is the Director of Social Research and Advocacy at Clean Yield Asset Management. A shareholder advocate for nearly two decades, Shelley has led and participated in a wide range of advocacy campaigns on a broad number of issues, including greenhouse gas emissions, corporate political spending, human rights, palm oil, and LGBT workplace policies. She was recognized by the Gay Financial Network and Fortune magazine as one of the 25 most powerful lesbians and gay men in business and by The Advocate magazine as “one of our best and brightest activists.” Her contributions were recognized by the Silent Spring Institute in 2005 with their first Rachel Carson Award. In 2005, she was voted by her industry peers to receive the SRI Service Award.

Fatima Angeles
Fatima is Vice President of Programs at The California Wellness Foundation, and oversees the Foundation’s grantmaking. Fatima joined Cal Wellness as a program director in February 1998 and became the director of evaluation and organizational learning in 2006. Before joining Cal Wellness, she was a program associate at the Hasbro Children’s Foundation. Fatima’s other philanthropic experience includes work with The Commonwealth Fund and the corporate philanthropy program of Pfizer Inc. Fatima served as director of the South of Market Teen Center and project coordinator for Asian American Communities Against AIDS. Fatima served as vice chair of the board of Grantmakers In Health, as secretary of the board of Northern California Grantmakers, and as chair of the board of the Asian & Pacific Islander American Health Forum. Fatima earned her master’s degree in public health from Columbia University and her bachelor’s degree in biology from the University of California, Berkeley.

Andrea Armeni
Andrea is the Co-Founder and Executive Director of Transform Finance, a field-building organization working at the intersection of capital and social change by building bridges between investors and communities. Transform Finance provides thought leadership and advisory services as well as concrete tools that promote social change both in and through finance. Andrea is also the lead convener of the complementary Transform Finance Investor Network, launched at the White House with an initial commitment of over $500 million that has since grown to $2 billion. He is recognized as an innovator in the field of impact investing, particularly at the intersection of systemic change and social justice. Andrea combines a corporate law and finance background with a deep engagement with social justice activism. He has taught at the Yale Law School and at Université Paris Dauphine in France. He is a BMW Foundation Responsible Leader, is a member of the Clinton Global Initiative and sits on the board of directors of the NGO Finance for Good Brazil and of CARE Enterprises, Inc.

Berit Ashla
Berit serves as Vice President at Rockefeller Philanthropy Advisors. Based in San Francisco, Berit leads RPA’s West Coast advisory work, manages client engagements and works with a range of individual, family and corporate donors. She brings a wealth of experience from a career spanning over two decades in grantmaking, foundation governance, education, social justice, arts and sustainability. She is a frequent contributor to national and regional philanthropic conferences and events and participates in many donor networks. She led donor engagement and program development activities as a Program Officer and Senior Advisor at Tides; managed the Threshold Foundation; served as Executive Director of the David Brower Center; and she was a Philanthropic Director of Foundation Source. Earlier in her career, she worked at the Marin Community Foundation, KQED Public Television and the United Nations Environment Program in Paris, France. Berit has a B.A. from Amherst College.

Jennifer Astone
Jennifer is the Executive Director of the Swift Foundation. Swift provides grants and investment capital to promote cultural and biological diversity. Swift supports Indigenous and local communities as well as organizations involved in advocating for land and resource rights, traditional knowledge systems, agroecology, and alternative economic models. Swift is a member of Divest Invest, the AgroEcology Fund, and the Global Alliance for the Future of Food. Jen earned her Ph.D. in cultural anthropology with fieldwork on women’s gardens in Guinea, West Africa and lives in Aptos, California with her partner and 12-year old son.

John Balbach
John is Associate Director, Impact Investments at the John D. and Catherine T. MacArthur Foundation. He brings more than twenty years of diverse experience across the nonprofit sector, large corporations, early-stage ventures and public-private partnerships to this role. Prior to MacArthur, he was integral to Silicon Valley Bank establishing a strong Seattle presence, and he led the financial effort that closed on both $23 million in venture capital and the eventual acquisition for a Seattle-based software company. John has served on a National Science Foundation commercialization review committee, managed and raised capital for an Impact Investing Fund focused on developing the Michigan life sciences sector and advised industry leading corporations on infusing cleantech solutions into their supply chains. He has also provided consulting services to leading nonprofit organizations with the Nonprofit Finance Fund, and served as a strategic advisor to hundreds of founders of technology-based startup ventures through a Michigan economic development program. He holds a B.S in Finance from Miami (Ohio) University, an M.A. from St. John’s College, and an M.P.A. from the University of Minnesota’s Humphrey School of Public Affairs.

Allison Barlow
Allison is Program Director for Democracy and Media at the Wallace Global Fund. Prior to joining the Fund she served as program advisor and consultant to the HKH Foundation, the Quixote Foundation, Beldon Fund, the State Infrastructure Fund, Open Society Foundations and other funders interested in catalyzing social change across issue areas. Allison is a board member of the Environmental Grantmakers Association, and serves on the steering committees of the Funders Committee for Civic Participation, the Media Democracy Fund and the Youth Engagement Fund. She is a graduate of Tufts University.
Mark Bateman
Mark is Aperio’s Director of SRI/ESG Research. He is an internationally recognized ESG/SRI expert and works with Aperio’s clients to create customized ESG/SRI/Impact solutions that reflect their values. In addition to his work with Aperio, Mark is the founder of Segue Point. Before founding Segue Point, he served as the Director of Research at IW Financial. Prior to that, Mark spent 11 years at the Investor Responsibility Research Center (IRRC) in Washington, DC. He serves on the board of directors for the Sustainable Investment Institute (SII), a social proxy research firm, and is the founder and publisher of CSR2, a newsletter on corporate responsibility issues for faith-based congregations. Mark holds a BA from The Johns Hopkins University and an MA from George Washington University.

Danielle Beavers
Danielle is the Diversity and Inclusion Director of the Greenlining Institute, advocating for the greater inclusion of people of color across Greenlining’s five major policy areas. For Danielle, every issue is an economic issue; decision makers must utilize the lived experiences of communities to ensure economic recovery and prosperity for the entire nation. To this effect, she regularly advises corporations and their regulators on metrics to best measure workforce and supplier diversity. This includes leading Greenlining’s work with the federal Offices of Minority and Women Inclusion and serving on the California Department of Insurance’s Diversity Task Force. She received her B.A. from Stanford University in Comparative Studies in Race and Ethnicity with Honors.

Melissa Beck
Melissa is the Executive Director of The Educational Foundation of America (EFA). Prior to joining EFA, Melissa was the CEO of Legal Information for Families Today (LIFT). Before LIFT, she worked on criminal justice reform at the Vera Institute of Justice and the Center for Alternative Sentencing and Employment Services (CASES). Prior to joining the nonprofit sector, Melissa worked as an Assistant District Attorney in the Sex Crimes and Appeals Units of the Kings County District Attorney’s Office, an Appellate Counsel at the Center for Appellate Litigation, and as an Associate at the criminal defense firm of Braffman & Ross, P.C. She is the author of numerous articles on nonprofit management and social justice issues and sits on the Leadership Council of the Support Center on Nonprofit Management. Melissa is a graduate of Hampshire College, received her JD from the Benjamin N. Cardozo School of Law, and holds a certificate in nonprofit management from the Columbia Business School.

Aner Ben-Ami
Aner is the Co-Founder and Managing Director of Pi Investments. Prior to Pi Investments, Aner was a Project Leader at the Boston Consulting Group, where he founded and ran the firm’s GC Micro Risk Solutions® division focused on designing and developing index-based micro( reinsurance programs for development banks, microfinance institutions and insurers in emerging market countries. He received a BA from the University of Puget Sound, where he was a Coolidge Otis Chapman Honors Scholar and is a board member at Earth Economics, a global leader in science-based economics. He is often quoted in financial industry press.

Molly Betournay
Molly is the Director of ESG and Impact Investing at Pathstone Federal Street, and she brings over 12 years of experience working in the sustainable investing arena to her role as the firm’s Director responsible for identifying ESG and impact investment opportunities. Previously, Molly was Head of U.S. Research for EIRIS, responsible for managing a team of seven research analysts specializing in ESG analytics for asset managers. She also served as Lead Sustainability Analyst for Pax World Funds, where she oversaw proxy voting and researched companies’ ESG profiles using quantitative and qualitative indicators to identify investment risk and opportunity. Molly holds an MBA from the Whittemore School of Business at UNH, where she also earned her BA in Linguistics. Molly serves on the US SIF Foundation’s Research Committee and Member Programming Committee. She is also a member of the New England International Donor’s Impact Investing Committee.

Alex Bernhardt
Alex is Principal and Head of Responsible Investment (RI) for Mercer in the U.S., and is a noted expert in catastrophe, weather and financial risk management. In his role as U.S. RI leader Alex is driving innovation in environmental, social and governance (ESG) risk assessment for investors of all types and sizes with a focus on climate change. Alex was a core contributor to Mercer’s 2015 Investing in a Time of Climate Change report and has served as a contributor or (co)lead on several other large-scale strategic research projects at Mercer. He regularly works with institutional investors on a range of issues from education on sustainable investment to portfolio risk assessment and construction exercises incorporating ESG considerations. Prior to joining Mercer, Alex was a Senior Vice President at Guy Carpenter, where he founded and ran the firm’s GC Micro Risk Solutions® division focused on designing and developing index-based micro( reinsurance programs for development banks, microfinance institutions and insurers in emerging market countries. He received a BA from the University of Puget Sound, where he was a Coolidge Otis Chapman Honors Scholar and is a board member at Earth Economics, a global leader in science-based economics. He is often quoted in financial industry press.

Suzanne Biegel
Suzanne is an individual donor/impact investor and is the founder of Catalyst at Large and the Founder/Chief Catalyst of Women Effect, an information hub for investors and philanthropists investing with a gender lens. She served on the Board of Directors of Confluence Philanthropy for 6 years. She was previously Vice Chair of the Board of Liberty Hill Foundation. She is a long time member of Women Donors Network. She serves as an advisor for the Wharton Social Impact Investment Investing in Women initiative, amongst a number of other
advisory positions. Suzanne has more than 25 years of experience as an entrepreneur, angel investor, philanthropist, board member, and hands-on operational manager. She is a fellow at the Aspen Institute. Suzanne received the Beacon Award in the UK in 2015. In the 1990s, she was the CEO of IEC, an e-learning and communications firm, which she and her partner sold in 1998. Suzanne holds degrees from the University of Pennsylvania and the Wharton Business School.

Patrick Briaud
Patrick is a Philanthropic Advisor at Rockefeller Philanthropy Advisors. He advises individuals, foundations and corporations on a range of donor services, including impact-interest exploration, strategic planning, grants management and impact evaluation. Patrick works alongside Vice President Heather Grady at the intersection of impact investing and the SDG Philanthropy Platform – a collaboration between the Hilton, Ford and MasterCard Foundations, the Foundation Center, and the UN to encourage philanthropy to engage more meaningfully in the Post-2015 Agenda. Patrick’s prior experience includes a post as investment analyst and head trader for a $900M portfolio and an accomplished professional tennis player. Patrick has a B.S. in Industrial Engineering and Operations Research from the University of California, Berkeley and an MBA from Yale’s School of Management.

Barbara Buchner
Barbara is Executive Director of the Climate Finance program at Climate Policy Initiative. Named one of the 20 most influential women in climate change, Barbara advises leaders on climate, energy, and land use investments around the world. Barbara is lead author on CPI’s Global Landscape of Climate Finance, which has set the benchmark for climate finance tracking, and Climate Finance in 2013-14 and the USD 100 billion goal. She directs CPI’s work as Secretariat of the Global Innovation Lab for Climate Finance (the Lab). The Lab’s public-private approach solicits, shapes, and tests cutting edge climate finance instruments that resolve financing barriers hindering alternative energy, adaptation, and land use projects. The Lab has helped raise over 500 million USD for its initiatives, and it was endorsed by the G7 in its first year of operation. She holds a PhD in Economics from the University of Graz and was a Visiting Scholar at MIT.

Anna Cable
Anna serves as Innovation and Business Development Lead for Gray Matters Capital (GMC) in Atlanta, GA. She leads GMC’s latest initiative, coLABS, which seeks to accelerate bold, new social ventures aiming to drastically improve the lives of women in under served markets around the world. Additionally, she co-founded the ecosystem-building venture Open Impact, which offers transformative experiences for investors to gain insight into the high-impact potential of investing in emerging markets. She has a diverse background in youth development, international education, U.S.-Japan relations, global health, and cross-sector diplomacy; the one common thread is a passion for helping people. Anna was a Fulbright Fellow to Japan and has experience in Mexico, South Africa, Uganda, Nicaragua, India, and Indonesia. She has a Masters of Public Health specializing in global health practice from the University of South Florida and a Bachelors of Arts in Sociology and Anthropology from Centre College.

Reverend Willie Calhoun Jr.
Reverend Calhoun is currently an associate minister at the New Israel Baptist Church, where he serves in the capacity of adult class teacher, board member, and education committee member. A lifelong resident of the lower ninth Ward, his love for the community and its people motivates him to work unceasingly to improve it by raising awareness, and addressing issues and policies pertinent to the community. His passion is to serve others. Reverend Calhoun is Chairman of Lower Nine Wellness Consortium, Secretary of Renaissance Project, Founder and Chairman of B.E.S.T. (Better Education Support Team), member of Justice and Beyond, Chairman of Lower Nine School Development Group, Chairman of Ninth Ward Ministerial Alliance, board member for the New Orleans Education Equity Round Table, and Parliamentarian for Lower Nine Voters Coalition. He served as a Deacon at the New St. Matthew Baptist Church for over 28 years. He was licensed to preach the gospel of our Lord and Savior Jesus Christ in 2005 at East Jerusalem Baptist Church. Under that same ministry, he was ordained by the Ideal Missionary Baptist Educational Association. He is a proud Alumnus of the great academic institutions of George Washington Carver Sr. High and Southern University at New Orleans.

Bruce Campbell
Bruce is the Founder of Blue Dot Advocates, formerly Campbell Law Group. With over 15 years of experience as a corporate attorney – including six years at the international law firm Hogan Lovells — Bruce brings a true depth of expertise to serve impact investors and entrepreneurs. He has advised clients on transactions worth billions of dollars in the aggregate, ranging from angel financings for start-ups to public offerings for multi-national companies. Bruce has completed corporate transactions on six continents, and he regularly visits with clients and collaborators and reviews projects in Europe, the UK, India and Sub-Saharan Africa. Bruce is himself an impact investor, and has committed to invest 100% of his assets in support of sustainable business practices.

Laura Campos
Laura is the Director of Corporate and Political Accountability at The Nathan Cummings Foundation. She has more than a decade of experience engaging public corporations on topics ranging from climate change to executive compensation. Laura previously served as the Director of Shareholder Activities for the Foundation. Prior experience includes serving as a Financial Advisor Associate at Sanford C. Bernstein & Co. and work on projects for the Arcus Foundation, the Aga Khan Foundation and Christian Aid. She serves on the Principles for Responsible Investment’s Small and Resource-Constrained Funds Steering Committee and is a member of the Advisory Board of ProxyDemocracy. Laura holds a Bachelor of Arts degree in International Relations from the College of Wooster and an MSc, Economics from the London School of Economics and Political Science.

Dave Castillo
Dave was appointed CEO of Native Capital Access in 2009. In this role, he has developed technical assistance services that build the capacity of tribal professionals in the use of debt financing for community development projects. Areas of emphasis include assessing market demand, underwriting development projects, leveraging tribal funds and structuring debt facilities unique to projects on tribal lands. Mr. Castillo is active in developing strategic partnerships with banks, CDFI’s and foundation partners to raise public- and private-sector equity and debt resources to support economic development and small business financing on tribal lands. Prior contributions to tribal community- and economic development include work within tribal government, financial institution and non-profit agency settings. Mr. Castillo is a member of ASU’s Construction In Indian Country Executive
SPEAKERS BIOGRAPHIES (C-D)

Board, and the Native CDFI Network Board of Directors. Mr. Castillo holds undergraduate and graduate degrees from Stanford University and an MBA from ASU. Mr. Castillo is of Nahua Indian descent.

Andrea Chen
Andrea is the Co-Founder and Executive Director of Propeller: A Force for Social Innovation, a social innovation incubator in New Orleans focused on systemic change in sectors such as food access, water, public health, and education. Propeller has accelerated over 90 new ventures that have generated over $60m in revenues and financing in the last five years. Successes include the Healthy School Food Collaborative, which has brought healthy school meals to 43% of New Orleans public schools. Propeller’s 10,000 s.f. Propeller Incubator facility is now home to over 150 socially minded companies. Andrea was named “40 Under 40” by Gambit Magazine, 2014 Aspen Institute Scholar, 2014 BALLE Fellow, 2014 Norman C. Francis Institute Fellow, and 2010 City Business Women of the Year. She completed her B.A. at Stanford University and M.Ed. at UNO and Harvard Graduate School of Education.

Stephanie Cohn Rupp
Stephanie is Managing Director, Impact Investing at Threshold Group. She brings more than 17 years of experience in global impact investing, impact fund design and implementation, and microfinance, as well as crowd funding. Stephanie works closely with Chief Investment Officer, Ron Albahary, CFA, in developing creative goals-based solutions for clients who desire portfolios aligned with what matters most to them. Stephanie’s extensive experience spanning the global ecosystem of impact brings with it a multifaceted toolkit of skills in sourcing, evaluating and measuring opportunities from both investment and impact perspectives. She has a MPA Degree in Finance and Macroeconomics from Harvard University Kennedy School of Government; an MS Degree in Comparative Government from the London School of Economics and Political Science; a BS Degree in Politics and Philosophy from the University of Bristol, and an OIB, Math and Economics (bilingual French English Education) from Lycée International de St Germain-en-Laye.

Liza Cowan
As an executive director of Global Philanthropy at JPMorgan Chase, Liza Cowan works to deepen engagement with internal and external partners, particularly around research and policy projects in community development and workforce readiness. Prior to Chase, Liza worked at the Greater New Orleans Foundation as the program officer for the Community Revitalization Fund, $25 million grant-making initiative supporting affordable housing development in post-Katrina New Orleans. Liza has been working on the Gulf Coast since 2005 when she came to volunteer after Hurricane Katrina as an alumna of the national service program Americorps. Raised in Louisville, Kentucky, Liza graduated from Dartmouth College and earned a Master’s in Education from Harvard. She is a Rockefeller Foundation Redevelopment Scholar and holds a certificate in Urban Redevelopment from the University of Pennsylvania. A 2012 graduate of Leadership Louisiana, Liza currently serves on the Advisory Board for the Cowen Institute at Tulane University and as a director of the Adirondack Council.

Sister Patricia Daly
Sister Patricia is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for 40 years. She serves as the Director Emeritus of the Tri-State Coalition for Responsible Investment after 23 years as Executive Director. With members of the Interfaith Center on Corporate Responsibility, Pat has worked with companies on issues of human rights, labor, ecological concerns, militarism, equality, health and tobacco, and international debt and capital flows. Pat has played a role in forcing General Electric to pay for a clean-up of the Hudson River, and since the late 1980s has been instrumental in placing climate change on the agendas of companies, especially in the utility, auto, and oil and gas sectors. Pat received an Honorary Doctorate in Business Leadership from Duquesne University and an Honorary Doctor of Laws Degree from William Paterson University. Sister Pat is the recipient of the 2014 Joan Bavaria Award, presented by Ceres and Trillium Asset Management.

Flozell Daniels
Flozell is the President and CEO of the Foundation for Louisiana where he has led more than $50 million of award-winning community investment strategies. Prior to the Foundation, Flozell was Tulane University’s Assistant Vice-President & Executive Director of State and Local Affairs for nine years. Before that, he was an Urban Policy Specialist & Administrative Assistant in the Office of the Mayor, Division of Federal and State Programs for the City of New Orleans. Flozell serves as Ex-officio & Policy Committee Chair of the Urban League of Greater New Orleans Board of Directors, where he was honored with the first-ever Distinguished Service Award for board leadership after serving five years as the post-Katrina Chair leading critical recovery efforts. Flozell graduated from University of Oxford Said Business School’s Impact Investing Programme; has an MBA from the A.B. Freeman School of Tulane University, and a BA in Biological Sciences from the University of New Orleans.

Rob Davenport
Rob is Managing Partner of Brightpath Capital Partners LP, an investment group focused on partnering with high potential businesses that have sustainability and social impact as an intrinsic part of their business model. Brightpath invests in venture and growth stage companies across the renewable energy, environmental technology, resource efficiency, healthy food, and sustainable agriculture sectors. Additionally, Rob serves as Chairman of the Board for Sungevity, Board Director for Blu Homes, Board Observer for Carbon Cure, advisor to Carbon Lighthouse, and previously served as a Board Director for Kilowatt Financial. Rob brings his personal interest in using market mechanisms to create value for community stakeholders as a board member with Beneficial State Bank (a CDFI serving traditionally underserved banking customers) and the East Bay Community Foundation. Rob earned his AB and MBA from Harvard University with postgraduate work in political economy at the University of Nairobi, Kenya as a Rotary Fellow.

Adam Davis
Adam is a Managing Partner at Ecosystem Investment Partners (EIP), a private equity fund manager that acquires and manages high priority conservation properties across the United States. EIP delivers competitive returns to its investors through the use of new, market-based mechanisms that reward landowners for the restoration and protection of their natural resources (such as wetlands, streams and endangered species), as well as the sustainable use of more traditional resources (such as forestry and agriculture). Adam previously served as the President of Solano Partners, Inc., a consulting firm focused on environmental investment and conservation finance issues. He is a Co-Founder and previous Editor-in-Chief of the Ecosystem Marketplace.
**SPEAKERS BIOGRAPHIES (D-E)**

- **Clarence Delcour**  
  Big Chief Delcour, born in 1948, first masked as Trail Chief of the Yellow Pocahontas Mardi Gras Indian tribe in 1973 under Big Chief Allison “Tootie” Montana. He originated a style which was the first full body costume construction – a type of costume which incorporates the vest and aprons into one overarching design. He is dedicated to continuing the culture of Mardi Gras Indians and the Creole Osceolas through mentorship, visits to academic institutions, and masking. Delcour is a respected member of the arts community who has shared the traditions of the Mardi Gras Indians with audiences locally, nationally and internationally. The US Senate, US House of Representatives, Louisiana House of Representatives, New Orleans City Council, Mayor of New Orleans, Mardi Gras Indian Hall of Fame and numerous schools and institutions have recognized him. He is the co-founder of New Orleans Black Indians Alliance. His leadership launched the first ball to honor Mardi Gras Indians in 2014, “Soiree of Feathers.” He is a New Orleans original.

- **Daniel DeSilva**  
  Daniel is the Wildman of the Flaming Arrows Mardi Gras Indians. He started as a 2nd Chief and moved to Spyboy because of his love of dance. He was blessed as Wildman by the Wildman of the Nation, after dancing at an Indian practice one night and being elected to take the Widman’s place. The Flaming Arrows sew to be pretty and they dance to do battle.

- **Daryn Dodson**  
  Daryn is a consultant to the Board of Directors at Calvert Funds; he also advises companies, foundations and universities on impact investments. At Calvert, he has advised them on their more than $69 million in impact investing funds and companies. Post Hurricane Katrina, Mr. Dodson served as Director of University and Corporate Partnership for the Idea Village, where he created a platform engaging leading private equity firms, business schools, and Fortune 500 companies to invest more than 50,000 hours and $2 million into New Orleans entrepreneurs. He also built a coalition of national banks and faith-based institutions to educate Congress on reforms needed to stabilize the subprime lending market with Self-Help Credit Union. Mr. Dodson currently serves as a Board Director for Ben and Jerry’s, Stanford Business Alumni, Impact Hub DC and Heifer Foundation. He earned a MBA from Stanford and an AB in Public Policy from Duke University.

- **Ellen Dorsey**  
  Ellen is Executive Director of the Wallace Global Fund, a private foundation focused on progressive social change in the fields of environment, democracy, human rights and corporate accountability, and with a special focus on mission-related investing. Dorsey was awarded the 2016 inaugural Nelson Mandela - Graca Machel Brave Philanthropy Award for Launching Divest-Invest Philanthropy. Dr. Dorsey served as Executive Director at the Rachel Carson Institute, launched the Human Rights and Environment program at Amnesty International, and served as senior program officer in the Heinz Endowment’s Environment Program. Additionally, she has served on numerous boards, including Greenpeace USA, the Global Initiative for Economic, Social and Cultural Rights, the United States Human Rights Network, and as chair of the board of Amnesty International USA.

- **Mike Eckert**  
  Mike has been an angel investor since 1997 and currently is Chairman of the NO/LA Angel Network, a New Orleans based group of 140 high net-worth individuals that invest in early stage companies. He was a member of the launch team of The Weather Channel/Weather.com where he served as its President and CEO for 14 years, and he also served as Chairman and CEO of Pathfire. Mike is also a member of the Board of Directors of the national Angel Capital Association (ACA), and he has served as Vice Chairman of the ACA and as Chair of the ACA’s Public Policy and Strategic Planning activities. Mike is past Chairman of the Atlanta Technology Angels, the largest angel investment group in the Southeast, and one of the most active angel investment groups in the US. Mike is a limited partner in a number of Venture Capital Funds, sits on the Boards of many early stage companies, is on the Investment Committee of the New Orleans Start-Up Fund, and on the Advisory Committee of the Louisiana Venture Capital Fund.

- **Nicholas Eisenberger**  
  Nicholas is the Managing Partner of Pure Energy Partners, a venture catalyst firm that invests in highpotential clean economy companies and partners with innovators to drive scale, profit, and impact. He is also co-founder of SuperCollider, an investment firm focused on early-stage cleantech companies using digital technologies to transform energy and resource use; co-founder and director of the CREO Syndicate, a network of family office investors focused on opportunities in the clean economy; and a former director of the American Council on Renewable Energy. Previously, Mr. Eisenberger was an investor at Churchill Capital, one of the first pure play cleantech venture firms, and later founded and led several pioneering companies in the digital and clean economy sectors, before serving as Managing Principal of GreenOrder, a boutique management consulting firm focused on sustainability as a source of value creation. Called by Fortune one of the clean economy’s “goto guys,” Mr. Eisenberger is recognized for his groundbreaking work with global companies, including GE and its multibilliondollar ecomagination initiative, which he helped guide from launch. Mr. Eisenberger holds degrees from Harvard College and Harvard Law School.

- **Jaune Evans**  
  Jaune is Executive Director of Tamalpais Trust (San Rafael, California), which supports indigenous-led global organizations building alliances in the areas of human rights, traditional knowledge and education, indigenous rights, cultural integrity, protection of sacred lands and waters, and gender equity. She has worked in philanthropy and public service for the past twenty-five years. Jaune served as Managing Director of Tides Foundation, Executive Director of Lannan Foundation and Executive Director of the New Mexico Community Foundation. She also served as Deputy Director of Public Health for the State of New Mexico with a special focus on public policy and services for people with HIV/AIDS. Jaune has a B.A. from Sarah Lawrence College, and an M.A. from The Johns Hopkins University.
Patricia Farrar-Rivas
Patricia is a Founding Partner and CEO of Veris Wealth Partners. She has been providing sustainable and impact investment advisory and wealth management services since 1992. Patricia, Rha Goddess and Jessica Norwood have been producing Uncommon Conversations since November of 2015, to explore how impact investing can support cultural entrepreneurs. Prior to Veris, Patricia led the effort by Silicon Valley-based public accounting firm, Frank, Rimerman + Co. to launch its new investment advisory subsidiary, Frank, Rimerman Advisors. She also co-founded the New York office of Progressive Asset Management in 1994. Earlier in her career, Patricia worked with Veris co-founder Michael Lent and community leaders in Central America on economic development, local empowerment, and social justice. She is a member of the Standards Council for the Sustainability Accounting Standards Board (SASB).

Ellen Friedman
Ellen is the Executive Director at the Compton Foundation, which seeks to ignite change toward a sustainable, just, and peaceful future. The Foundation’s program strategy supports transformative leadership and courageous storytelling in the areas of peace, environment, and women’s reproductive health, rights, and justice. Under Ellen’s leadership, Compton became one of the original 17 signatories of the Divest/Invest Philanthropy pledge and she has led Compton’s transition to a 100% mission aligned investment portfolio. Previously Ellen served as the executive vice president of Tides where she worked for 23 years with individual donors and other social change activists. She is a trustee of Futures Without Violence, a member of the Divest/Invest Philanthropy Management Team, serves on the Steering Committee of Peace and Security Funders group and the Advisory Board of The California Endowment’s Building Healthy Communities Initiative.

Shawn Ginwright
Shawn, a leading national expert on African American youth activism and development, serves as the Senior Research Associate at the Cesar Chavez Institute for Public Policy as well as Associate Professor of Education in the Africana Studies Department at San Francisco State University. Dr. Ginwright currently serves on the Board of Directors for the California Endowment with oversight of a 3 billion dollar endowment to improve the health of California’s underserved communities. Additionally, he served on the Board of Directors for the Institute for Sustainable Economic, Educational and Environmental Design (I-SEEED) in Oakland, CA. He is the author of “Hope and Healing in Urban Education” and “Black Youth Rising, Activism and Radical Healing in Urban America” among others.

Rha Goddess
Rha Goddess is the CEO of Move The Crowd, and the entrepreneurial soul coach behind hundreds of breakthrough changemakers, cultural visionaries and social entrepreneurs. From multiple NY Times Bestsellers to multi-million dollar social enterprises, Rha’s unique methodology has empowered a new generation of conscious entrepreneurs to stay true, get paid, and do good. From the onset of her more than 30-year career as a cultural innovator, social impact strategist and creative change agent, Rha has drawn on the power of creativity, culture and community to move hearts, minds and policy. Rha’s work has focused on issues of racial justice and equality, electoral politics, offender aid and restoration, mental health and youth and women’s empowerment and contributed to initiatives that have impacted millions of lives. As CEO of Move The Crowd, Rha is galvanizing a movement of 1 Million entrepreneurs dedicated to re-imagining “work” as a vehicle for creative expression, financial freedom and societal transformation.

Steven Godeke
Steven helps foundations, families and money managers drive positive change. Godeke Consulting develops specific impact investing strategies and connects its clients to the best partners and resources. His clients include The Rockefeller Foundation, The Global Impact Investing Network, The World Economic Forum and corporate clients in the financial services and pharmaceutical industries. Steven is a trustee and chairs the investment committee of the Jessie Smith Noyes Foundation, a private family foundation with a long tradition of aligning its investments and social justice mission. Steven is also an adjunct professor of finance at New York University’s Stern School of Business and the Center for Global Affairs, where he teaches Investing for Environmental and Social Impact. Prior to establishing his own firm, Steven worked in corporate and project finance with Deutsche Bank. He studied as a Fulbright Scholar at the University of Cologne and earned an M.P.A. from Harvard University.

Paula Goldman
Paula is Vice President and Global Lead for Impact Investing at Omidyar Network. She leads the firm’s global efforts to accelerate the impact investing industry through investments, strategic partnerships, and thought leadership, as frequently serves as an advisor to high net worth individuals seeking to engage in impact investing. In 2014, she acted as Executive for the National Advisory Board on Impact Investing, which helped produce significant policy changes that facilitates impact investing for foundations and pension funds. A movement builder and entrepreneur by training, Paula has extensive experience leading frontier market businesses and was the founder and director of Imagining Ourselves, a project of the International Museum of Women that attracted more than one million participants and received numerous accolades. She earned a Ph.D. from Harvard University, where she studied how unorthodox ideas become mainstream. She has co-authored several seminal pieces on impact investing, including Priming the Pump and Frontier Capital, and is a contributing author to publications including the Harvard Business Review and the Financial Times.

John Goldstein
John is a managing director within Goldman Sachs Asset Management. John joined Goldman Sachs in 2015 through the acquisition of Imprint Capital to help expand the firm’s Environmental, Social and Governance and impact investing capabilities. Previously, John co-founded Imprint Capital Advisors in 2007 to help foundations, families and financial institutions create and manage impact investing programs and portfolios. Imprint made and managed more than 120 investments with its clients and worked with 11 of the 25 largest U.S. foundations. John has served as an advisor or board member to a diverse set of organizations in the impact space, such as the US National Advisory Board of the G8 Social Impact Investing Task Force, McKinsey’s working group on Social Impact Bonds, the UN Capital Development Fund, and the International Interfaith Investment Group. John graduated from Yale University with honors. He was awarded the Richter Fellowship and the Townsend Prize.
Jane Goodall
Jane was born on April 3, 1934, in London. At the age of 26, she followed her passion for animals and Africa to Gombe, Tanzania, where she began her landmark study of chimpanzees in the wild – immersing herself in their habitat as a neighbor rather than a distant observer. Her discovery in 1960 that chimpanzees make and use tools rocked the scientific world and redefined the relationship between humans and animals. In 1977, she established the Jane Goodall Institute to advance her work around the world and for generations to come. JGI continues the field research at Gombe and builds on Dr. Goodall’s innovative approach to conservation, which recognizes the central role that people play in the well-being of animals and the environment. In 1991, she founded Roots & Shoots, a global program that guides young people in nearly 100 countries in becoming conservation activists and leaders in their daily lives.

Today, Dr. Goodall travels the world, speaking about the threats facing chimpanzees, environmental crises and her reasons for hope. In her books and speeches, she emphasizes the interconnectedness of all living things and the collective power of individual action. Dr. Goodall is a UN Messenger of Peace and Dame Commander of the British Empire.

Julie Fox Gorte
Julie is the Senior Vice President for Sustainable Investing at Pax World Management LLC. She oversees Environmental, Social and Governance-related research on prospective and current investments as well as Pax’s shareholder advocacy and work on public policy advocacy. Prior to joining Pax, Dr. Gorte served as Vice President and Chief Social Investment Strategist at Calvert. Her experience before she joined the investment world in 1999 includes nearly 14 years as Senior Associate and Project Director at the Congressional Office of Technology Assessment, Vice President for Economic and Environmental Research at The Wilderness Society, Program Manager for Technology Programs in the Environmental Protection Agency’s policy office and Senior Associate at the Northeast-Midwest Institute. Dr. Gorte serves on the boards of Ceres, the Sustainable Investments Institute, the Endangered Species Coalition and the American Sustainable Business Council. Dr. Gorte received her Bachelor of Science from Northern Arizona University and a Master of Science and Ph.D from Michigan State.

Ilmi Granoff
Ilmi is the Director of ClimateWorks Foundation’s Sustainable Finance Program. He is an attorney and policy expert in green, low-carbon investment, with a decade and half of experience in environmental law and policy, sustainable development, energy and infrastructure finance, and public-private partnerships. Previously, Ilmi headed the Green Growth Business Unit at the Overseas Development Institute, served as the Special Counsel for Climate and Environment and the African Development Bank, and practiced law in the global energy and infrastructure group at Freshfields. He holds graduate degrees in law, international relations, and environmental science from Yale University and New York University.

Linda Green
Chef Linda is Owner and Head Chef of Soul Food Catering Company. She is well-known and highly regarded as a New Orleans Icon in the community. In addition to her local notoriety, she is internationally known as the winner of Food Network’s Chopped Pride of New Orleans and has been featured on internationally syndicated TV shows including Anthony Bourdain’s No Reservations, Larry the Cable Guy and United Taste of America. She won the Vegan Gumbo Contest for Food Network in 2013. For the past 20 years+, Ms. Linda has sold her Soul Food along second line routes, food events and festivals. She’s been featured in numerous local and national publications. Then Hurricane Katrina hit, and she wasn’t called back to work. However, since Ms. Linda already had a following from selling her food part time at festivals and local events, she made a decision to become a full-time culinary entrepreneur. Her menu consists of home-cooking, soul food and New Orleans classics.

James Hansen
Jim, formerly Director of the NASA Goddard Institute for Space Studies, is an Adjunct Professor at Columbia University’s Earth Institute, where he directs a program in Climate Science, Awareness and Solutions. Dr. Hansen is best known for his testimony on climate change in the 1980s that helped raise awareness of global warming. He is a member of the U.S. National Academy of Sciences and has received numerous awards including the Sophie and Blue Planet Prizes. Dr. Hansen is recognized for speaking truth to power and for outlining actions needed to protect the future of young people and all species on the planet.

Erin Harkless
Erin is a Senior Investment Director at Cambridge Associates. She advises a variety of private clients and institutional investors on asset allocation strategy, manager selection, and investment program evaluation, works with clients to develop strategies for impact and mission-driven investments, and is a member of the firm’s Mission Related Investing Practice. Prior to joining Cambridge, Erin was a summer associate at the Princeton University Investment Company and an associate at Summit Rock Advisors. Erin started her career as an analyst at Goldman Sachs in the Investment Management Division as part of the Alternative Investments and Manager Selection team. Erin received her MBA from the Harvard Business School and her BS magna cum laude from Washington University in St. Louis. She is also a CFA charterholder and member of the CFA Society of Washington DC.

Jeff Hebert
Jeff was appointed Deputy Mayor and Chief Administrative Officer of the City of New Orleans on August 15, 2016, and continues to serve as the City’s first Chief Resilience Officer. He previously served as the Executive Director of the New Orleans Redevelopment Authority (NORA) where he oversaw $42.5 million in direct investment and leveraged over $191 million in additional capital. Prior to being appointed to NORA, from 2010 to 2012, Hebert served as the Mayor’s Director of Blight Policy and Revitalization. Before joining the Landrieu Administration, Hebert led the state’s Regional Plan for Recovery and Growth following the devastation from Hurricanes Katrina and Rita as the Director of Community Planning for the Louisiana Recovery Authority. Over the past eight years, Jeff has advised government officials across the globe on disaster recovery planning and implementation. As Chief Resilience Officer, Hebert oversees the implementation of the nation’s first Comprehensive Resilience Strategy, development of the city’s climate action plan and sea level rise and climate adaptation strategies, and was recently appointed by Governor John Bel Edwards to the Governor’s Advisory Commission on Coastal Protection, Restoration, and Conservation. Mr. Hebert holds a Bachelor’s degree in Urban Design and Architecture Studies from New York University, a Master in City Planning from the Massachusetts Institute of Technology, and is a graduate of the NeighborWorks America Achieving Excellence in Community Development program at Harvard University’s John F. Kennedy School of Government.
Brian Heese
Brian is a Senior Manager of Investor Relations at One Acre Fund, a dynamic social enterprise that sells seed, fertilizer and solar lights to 400,000 farmers in Africa. As head of Investor Relations, Brian raises debt to finance One Acre Fund’s working capital needs. Prior to joining One Acre Fund, Brian ran a job program at Cristo Rey NY, a college-preparatory high school in East Harlem where students from low-income backgrounds work to pay for their education. He also spent 12-years in investment banking with Merrill Lynch and 8 years as an auditor with Price Waterhouse. Brian has an MBA from the Wharton School at the University of Pennsylvania and a BBA from Loyola University in New Orleans.

Norris Henderson
Norris is the Founder and Executive Director of Voice of the Experienced, also known as VOTE, a New Orleans-based grassroots organization working to build political and economic power of people impacted by the criminal justice system. Henderson, a former OSI Soros Justice Fellow, works on a range of issues including police accountability, public defense, and prison reform. He also serves on the Board of Directors for multiple organizations, including Family & Friends of Louisiana’s Incarcerated Children. He is the past recipient of the 2015 Martinet Society Award for advancing the cause of justice, 2014 Data News Weekly “Trailblazer of the Year” and the 2013 Society of American Law Teachers Human Rights Award.

Carolina Henriquez-Schmitz
Carolina is a Legal Manager and U.S. in-house counsel at the Thomson Reuters Foundation, where she leads the TrustLaw service in the Americas, a global pro bono legal program that connects the best law firms and corporate legal teams with high-impact NGOs and social enterprises working to create social and environmental change. Carolina also leads TrustLaw’s Social Enterprise and Impact Investing legal training course in the United States. Prior to joining the Foundation, Carolina worked in private practice at Debevoise & Plimpton LLP. She was previously a legal intern at the World Bank, where she advised on the development and implementation of financial and technical assistance projects in Latin America, and a legal fellow for the Zambian Law Development Commission, where she advised on legal reform of human trafficking and children’s rights legislation. Carolina is a qualified lawyer in the U.S. and Venezuela and received a Master’s Degree from Harvard Law School, where she studied international development and finance.

Kris Hermanns
Kris is Chief Executive Officer of the Pride Foundation. Kris has nearly two decades’ experience and expertise as a policy and program strategist, fundraiser, and nonprofit administrator. Before joining Pride Foundation, Kris was the Deputy Director at the National Center for Lesbian Rights, where she led the development department, provided day-to-day internal management of the organization, and advised on strategic direction. Prior to that, she was a Program Officer with The Rhode Island Foundation and worked for Brown University’s Howard R. Swearer Center for Public Service. Kris served on the Board of Directors of Funders for LGBTQ Issues and is a shareholder of the Green Bay Packers of the National Football League. She earned a Masters of Education in Administration, Planning, and Social Policy from Harvard University and a B.A. in political science from the University of Wisconsin-Madison.

Wendy Holding
Wendy is part of the Sustainability Group of Loring, Wolcott & Coolidge, joining the firm in 2005 after six years at Wellington Management on the high yield bond team. Her career began in Bozeman, Montana, where she worked at Wild Forever, a grizzly bear conservation group. She decided to pursue a career in finance after witnessing the roles economics play in driving conservation policy. Wendy graduated cum laude from Princeton University, is a CFA charter holder and a graduate of the National Trust School. She is a member of the Boston Security Analysts Society, the Social Venture Network, and currently serves on the Board of the Jesse Smith Noyes Foundation & the Princeton University Rowing Association. She is a founding member of Sprout Lenders, LLC.

Steve Howard
Steve is the former Chief Sustainability Officer at IKEA Group. Prior to IKEA, Steve was the founder and CEO of The Climate Group, an independent non-profit organization working internationally with government and business leaders to cut global emissions and build a low carbon economy. Prior to the Climate Group, Steve spent 15 years advising major corporations, NGOs and UN bodies on the environment. He was the founding Director of the Global Forest and Trade Network for WWF International. Steve is also former chair of the UK Forest Stewardship Council (FSC) and was founding chair of the Tropical Forest Trust. He is a past Chair of the World Economic Forum’s Global Agenda Council on Climate Change and in 2015 chaired the Postcode Lottery Green Challenge jury. During the run up to the historic Paris Agreement, he was the co-founder of We Mean Business and RE100. Steve has a first-class honors degree in ecology and a PhD in environmental physics. He was listed in the Independent on Sunday’s top 100 UK environmentalists in 2008 and won Social Entrepreneur UK at the Ernst & Young Entrepreneur of the Year awards in 2009. In 2013, he became a TED speaker after taking the stage at the TEDGlobal opening session “Moments of Truth”.

Kristin Hull
Kristin is a social change agent, entrepreneur and impact investor, helping others invest into the world in which they want to live using finance as a tool for social change. She is devoted to promoting inclusion and diversity in leadership, and to re-envisioning capitalism. Kristin founded Nia Community Investments in 2010, a 100% impact portfolio. In 2013 Kristin launched Nia Global Solutions. Prior to Nia, Kristin served as President and Chair of the Board of the Hull Family Foundation from 2007 to 2011, where she oversaw all of the investment efforts and transitioned the endowment from a traditional investment portfolio to one of the country’s first 100% mission impact invested portfolios. From 1990 to 2007 she worked as an educator in the Bay Area. She earned her B.A. and teaching credentials at Tufts University, her M.A. in Research in Bilingual Education from Stanford University and her Ph.D. in Urban Education from the University of California at Berkeley.

Sayer Jones
Sayer is the Director of Mission Related Investments at the Meyer Memorial Trust in Portland where he oversees a portfolio of public and private regional investments. In this role he identifies, reviews and invests in opportunities that support the Trust’s mission to build a flourishing and equitable Oregon, including the Portland Seed Fund, Elevate Capital, Oregon Angel Fund, Women’s Venture Fund and Ecotrust Forests. In addition, Sayer has helped shepherd MMT’s
Stanley Keasling

Stanley is the CEO of the Rural Community Assistance Corporation (RCAC). He began his community development experience as a VISTA Volunteer with Self-Help Enterprises (SHE) in 1973. At SHE, Mr. Keasling worked with the self-help, multifamily and public facility programs. He helped establish the community development program, which then formed Rural Community Assistance Corporation (RCAC) in 1978. Mr. Keasling served as RCAC’s division director for community development programs from its inception in 1978 to 1982. He returned to SHE in 1982 as a program director where he supervised self-help housing and community development programs. Mr. Keasling became executive director of Rural California Housing Corporation (RCHC) in 1986, initiated the RCHC merger with Mercy Housing in 2000 and remained with Mercy Housing as vice president and senior vice president until July 2006. Mr. Keasling worked as a private consultant for a short while prior to taking the helm at RCAC.

Liz Kennedy

Liz is the Director of Democracy and Government Reform at the Center for American Progress. Previously, she served as counsel and campaign strategist at Demos and counsel at the Brennan Center for Justice, working on voting rights, money in politics, and corporate accountability. Prior to that, she was Deputy Director for Voter Protection in Ohio for President Obama’s 2008 campaign, a labor lawyer representing unions in industrial bankruptcies, a litigation associate at Cravath, Swaine, and Moore, and a student organizer and canvass director with the Public Interest Research Groups. Liz is a graduate of NYU School of Law and Smith College, and a native of Brooklyn, New York.

Peter Knight

Peter is a Founding Partner of Generation Investment Management, which focuses on sustainable investing strategies in public and private markets. Prior to joining Generation, Peter was a Managing Director of MetWest Financial, a Los Angeles-based financial services company from 2001 to 2003. From 1977 to 1989, he served as Chief of Staff to former VP Al Gore when Mr. Gore was a member of the U.S. House of Representatives and later the U.S. Senate. Peter served as the General Counsel of Medicis Pharmaceutical from 1989 to 1991, and then established his law practice representing numerous Fortune 500 companies as named partner in a Washington D.C. law firm. Peter started his career with the Antitrust Division of the Department of Justice. Peter has held senior positions on four presidential campaigns, including serving as the campaign manager for the successful 1996 re-election of President Clinton. Peter has a BA from Cornell University and a JD from the Georgetown University Law Center. Peter serves as a Board Director for the National Park Foundation.

Sonia Kowal

Sonia is the President of Zevin Asset Management, with responsibility for corporate matters, business practices, strategic planning, and marketing. She is also a member of the firm’s investment committee, where she incorporates sustainability issues into investment decision-making. She manages environmental, social, and governance research, proxy voting, and the corporate engagement strategies of the firm. Previously, Sonia headed Ethical Investment Research Services’ (EIRIS) U.S. office and was a portfolio manager and investment research analyst at Baillie Gifford in Scotland, where she had responsibility for investments in Emerging Markets. Sonia holds a BS in Zoology from the University of Edinburgh and an MS in Investment Analysis from the University of Stirling, Scotland.

Irene Krarup

Irene is the Executive Director of the V. Kann Rasmussen Foundation, based in New York. The foundation focuses on international and federal-level US projects within the broader environmental fields of climate change, biodiversity loss, and planetary boundaries. Irene came to the foundation in 2008 from the Danish Foreign Service, where she had held positions in New York and Prague. She has also worked as a strategic consultant on county-level policy in Denmark and taught drama and social science in the continuing education system. Irene is a member of the Steering Committee of the Global Alliance for the Future of Food and the Climate and Energy Funders’ Group. She serves on the board of the Bikuben Foundation New York and a number of cultural organizations in Denmark and the US. She was educated in dramaturgy and Eastern European studies at Aarhus University in Denmark.
Winona LaDuke
Winona is the Executive Director of Honor the Earth (HTE), which she co-founded with the Indigenous Peoples to raise awareness of and money for indigenous struggles for environmental justice. She is also a rural development economist and author working on issues of Indigenous Economics, Food, and Energy Policy. She is the Founder of the White Earth Land Recovery Project, one of the largest reservation-based non-profit organizations in the country. In 2007, LaDuke was inducted into the National Women’s Hall of Fame. In 1994, LaDuke was nominated by Time magazine as one of America’s fifty most promising leaders under forty. She has been awarded the Thomas Merton Award, MS, Woman of the Year, and the Reebok Human Rights Award. LaDuke was a cofounder and Board Co-Chair of the Indigenous Women’s Network for fifteen years, and maintains a significant role in international advocacy for Indigenous people. She is a graduate of Harvard and Antioch Universities.

Dana Lanza
Dana is the CEO of Confluence Philanthropy, which she launched in August of 2009 after serving as the executive director of the Environmental Grantmakers Association (EGA). From 2009-2011 Dana served as the Program Director and Board Advisor at The Swift Foundation while launching Confluence. Prior to Philanthropy, Dana founded Literacy for Environmental Justice (LEJ), an environmental education and youth empowerment organization for at-risk youth. While there, she acted as a lead organizer in the closure of San Francisco’s infamous Hunters Point Power Plant; raising funds to supplant it with the region’s first off-the-grid educational Eco Center. She has been a fellow at the Donella Meadows Program in Systems Theory and the California Women’s Foundation Policy Institute. Dana has also lived and worked among the Samburu (Maasai) in northern Kenya for many years; the Cheyenne River Lakota; and Roma refugees in Europe.

Genaro Lopez-Rendon
Genaro is the President of the Jessie Smith Noyes Foundation. He is a Chicano born and raised in Texas with 20 years in the environmental and economic justice movement, organizing on issues such as racial justice, workers’ rights, economic equity and building power for and with poor black and brown families from the local to international arena. Genaro was a 2013 Alston Bannerman Fellow, in recognition of his long-term commitment to community organizing. In 2014, Genaro became a Fellow with the W. K. Kellogg Foundation’s inaugural Community Leadership Network. He has also served on numerous boards including the National Domestic Workers Alliance, the Gulf Coast Fund and Grassroots Global Justice Alliance.

Leslie Lowe
Leslie is the Program Officer for Institutional Accountability & Individual Liberty at the Rockefeller Family Fund. She is an attorney who specialized in environmental law, and corporate environmental disclosure and governance. Prior to Joining RFF, Leslie directed the Energy and Environment Program at the Interfaith Center on Corporate Responsibility for seven years, and was Executive Director of the New York City Environmental Justice Alliance. A graduate of Harvard Law School, Leslie received her B.A. from Bennington College, a Masters of Science from Columbia University’s Graduate School of Journalism, and did post-graduate research in economic and social history at the University of Paris. Leslie has been a Senior Advisor to As You Sow, and a member of the American Bar Association’s Committee on Environmental Disclosure. She serves on the board of River Network and is a past Chair of the Jessie Smith Noyes Foundation’s Board of Directors. Leslie is a native New Yorker who now makes her home in New Orleans.

Susan Mac Cormac
Susan is a partner at Morrison & Foerster, where she serves as chair of the firm’s Social Enterprise and Impact Investing group, co-chair of the Clean Technology + Alternative Energy group, and co-chair of the Energy group. In 2015, the Financial Times named Ms. Mac Cormac as Attorney of the Year in 2016 and 2012 for her work in the impact space. She has particular expertise on ensuring energy, sustainability and other investments have positive impact – through use of new corporate forms, hybrids, alternative debt and equity instruments, and disclosure. Ms. Mac Cormac frequently advises innovative social enterprises and investors on corporate structure, equity and debt financings, mergers, acquisitions, reorganizations, and joint ventures. She also counsels corporations on the intersection of fiduciary duties and environmental sustainability as well as disclosure around ESG. She is a board member for Business for Social Responsibility (BSR) and member of the Ceres President’s Council. She is a professor of social enterprise law at UC Berkeley School of Law.

Bob Marshall
Bob is a Pulitzer Prize-winning journalist who has covered the people, stories and environmental issues of Louisiana’s wetlands for more than 35 years for The Times-Picayune as well as national publications. He now writes for The Lens. An avid outdoorsman, he has spent much of his adult life in the marshes and swamps of South Louisiana, charting the demise of wetlands he calls “my office and playground.” In 2007 Marshall was co-author of the series entitled, “Last Chance: The Fight to Save a Disappearing Coast,” about Louisiana’s coastal erosion problems, which won top awards from Columbia University and the National Academies of Sciences. In 1996 he was co-author of the Pulitzer-winning series “Oceans of Trouble,” examining the plight of the world’s fisheries and the decline of Louisiana’s coastal wetlands. In 2005 he investigated the missteps in building the New Orleans levees and flood walls that caused 80% of New Orleans to flood during and after Hurricane Katrina, part of the package that won the Pulitzer Prize for Public Service.

Jessica Matthews
Jessica is the Head of the Mission-Related Investing Practice at Cambridge Associates, overseeing the activities of all MRI resources across the firm, including a team of generalist and research directors and analysts. Jessica works with a variety of clients including foundations, religious institutions, universities, and high-net worth
SPEAKERS BIOGRAPHIES (M-N)

Bi kashtesko merel i yag.
Without wood the fire would die.
- Romani Proverb

families. She also publishes research on topical areas of interest to clients, is a frequent speaker and guest lecturer on MRI topics, and is actively engaged with various field-building organizations in the areas of MRI and impact investing. Prior to rejoining Cambridge Associates in 2008, Jessica was an Associate at Booz Allen Hamilton; she worked in the Investment Office at the American Red Cross; and in the Global Consultant Relations group at BlackRock. Jessica began her career with Cambridge Associates as a consulting analyst. Jessica graduated from the University of Virginia with a BA in Government and a Minor in Economics.

Justin Maxson
Justin is the Executive Director of the Mary Reynolds Babcock Foundation. As Executive Director, Justin manages the overall operations of the Foundation, leads staff in developing strategy and initiatives to accomplish the Foundation’s mission and makes recommendations to the Board. Before joining the Foundation, Maxson served for 13 years as president of the Mountain Association for Community Economic Development in Kentucky.

Bill McKibben
Bill is a Founder of the grassroots climate campaign 350.org and the Schumann Distinguished Professor in Residence at Middlebury College in Vermont. He is a 2014 recipient of the Right Livelihood Prize, sometimes called the ‘alternative Nobel.’ He has written a dozen books about the environment, including his first, The End of Nature, published 25 years ago, and his most recent, Oil and Honey.

Janet McKinley
Janet is Founder and Principal Investor of Advance Global Capital. She has over 25 years of investment experience, having managed global portfolios in 3 of the 10 largest equity mutual funds in the US. She retired in 2004 as a Director of Capital Research and Management Company (assets in excess of US $1 trillion) and principal executive officer of The Income Fund of America. An active philanthropist for over 20 years, Janet is chair emerita of the board of Berkeley Endowment Management Company. In the past she has served as board chair of Oxfam America, board trustee of Oxfam International, board member of Smith College, the Deutsche Bank Microfinance Consortium Fund and MicroCredit Enterprises. She was a Fulbright Scholar, received her BA degree from Smith College, and attended New York University Graduate School of Business.

Sandra Mikush
Sandra is a co-founder of the Just Transition Fund, an initiative launched by the Rockefeller Family Fund and Appalachia Funders Network in 2015. The Just Transition Fund seeks to build visionary, resilient communities that embrace a new energy economy that works for everyone. JTF provides grants to frontline coalfield and power plant communities and serves as a hub connecting communities with peers and transition experts, and to philanthropic, public and private sector resources. Sandra formerly served as deputy director of the Mary Reynolds Babcock Foundation, where she led the Foundation’s efforts to advance Appalachia’s economic transition and managed the Foundation’s move toward 100% mission investing. Sandra was a member of the founding executive committee of Mission Investors Exchange and founding chair of the Appalachia Funders Network. A North Carolina native and graduate of Duke University, Sandra lives with her husband in the NC mountains, where she enjoys hiking and kayaking.

Andreaneia Morris
Andreaneia serves as the Executive Director for HousingNOLA, a 10-year public private partnership working to solve New Orleans’ affordable housing crisis. Prior to her role as Executive Director, Morris spearheaded the creation of the HousingNOLA 10-year Strategy and Implementation Plan, under the direction of the Greater New Orleans Housing Alliance (GNOHA), the Foundation for Louisiana, the City’s Office of Housing and Community Development, and dozens of public, private, and nonprofit organizations. The strategy, released on December 10, 2015, indicates the need for 33,600 additional housing opportunities in the city by 2025.

Craig Muska
Craig founded and served as President of Canopy, a new model for strengthening local communities and promoting economic development by developing a pipeline of scalable, regionally-focused investment opportunities. As president, Craig played a key role in the development and launch of Canopy and collaborated with a diverse group of community-focused leaders, public sector stakeholders, universities, and place-based foundations. Prior to founding Canopy, Craig served as Director of Investments for Threshold Group’s Foundation Services. He has worked with leading private foundations, institutional investors and asset managers to develop impact aligned investment strategies and collaborations. He brings a diverse background from his strategy and investment roles at Envestnet Asset Management, Credit Suisse HOLT, and Nuveen Investments. Craig earned a BA in finance from Northern Illinois University and a MS in public administration from the University of Illinois, Chicago.

Jennifer Near
Jennifer has over 14 years of experience working in grantmaking and philanthropy, donor organizing, resource development, and program management. Her areas of expertise include: developing strategies to shift power in the field of philanthropy; working with nonprofit partners to increase their organizational capacity; providing technical assistance and support to a range of strategic partners; and working in the Just Transition framework to shift from the extractive, fossil-fuel-based economy to the local, living, regenerative economy. Jennifer most recently served as the Program Director for The Libra Foundation working across the grants and investment programs to advance the foundation’s human rights mission. She is currently working as a consultant to the “Shake the Foundations” project with the support of
the Fund for Democratic Communities as well as serving as a Board member for 350NH and the Endowment for Health.

Greg Neichin
Greg is the Director of Ceniarth, a single-family office focused on funding market-based solutions that benefit underserved, rural communities. Ceniarth primarily engages in developing economies in sectors such as agriculture, energy, and financial inclusion. Prior to Ceniarth, Greg served as Executive Vice President of Cleantech Group where he led the firm’s global advisory business helping investors identify and evaluate opportunities in energy and resource markets. He spent four years on the management team of GetActive Software and co-founded PlaceVine. Greg began his career as a consultant with Oliver Wyman. Greg has a B.A. from Dartmouth College and an M.B.A. and co-founded PlaceVine. Greg began his career as a consultant with Oliver Wyman. Greg has a B.A. from Dartmouth College and an M.B.A. from the Wharton School at the University of Pennsylvania.

Greg Nelson
Greg recently joined Parker Media and the Parker Foundation to lead strategy and business operations. Greg previously spent six years at the Obama White House as a senior leader in the economic policy, clean energy, technology, and strategic partnerships teams. During his tenure at the White House, Greg’s policy portfolio included international trade, economic policy, and US participation in the G7 and G20, infrastructure, technology policy, clean energy, entrepreneurship, and startups. Greg was also the chief of staff at the National Economic Council for director Gene Sperling, and the deputy director of the White House Office of Public Engagement focused on public-private partnerships, including as deputy director of the President’s Council on Jobs and Competitiveness. Prior to the White House, Greg helped build and sell a technology company, developed startups in energy and biomaterials, and consulted for businesses, nonprofits, and foundations. He holds a BA in political science and history from Yale University.

Andrea Nemtin
Andrea is the CEO and founding president of Inspirit Foundation. She is a creative, committed and passionate leader in strategic philanthropy, social finance and social innovation. Andrea has led her team to launch a series of critically needed programs to address inclusion in Canada including the foundation’s first roadmap towards a 100% impact investing portfolio. Andrea was one of the founders of the Philanthropic Communities Declaration of Action on Reconciliation, and an adult ally of the 4Rs Youth Movement. Prior to Inspirit, Andrea spent 15 years as the President and CEO at PTV Productions, creating socially impactful, award winning broadcast and interactive media. She began her career in changemaking running social marketing campaigns at Adbusters Media.

Simon Nicholson
Simon is Assistant Professor and Director of the Global Environmental Politics Program in the School of International Service at American University, Washington DC. He is also co-director of the Forum for Climate Engineering Assessment. The Forum is a leading research and public policy group on the social, political, and legal questions raised by climate engineering or “geoengineering” technologies (see www.assessment.org). Simon’s research and public engagement focus on global environmental governance and the politics of emerging technologies. His most recent book (co-edited with Sikina Jinnah) is “New Earth Politics: Essays from the Anthropocene” (MIT Press, 2016).

Sergio Oceransky
Sergio is the CEO and Founder of The Yansa Group, a not-for-profit wind developer that partners with indigenous, peasant and fisherfolk communities to harness and sell their renewable energy resources, creating a stream of income that supports robust and diversified local development. An Ashoka-Lemelson fellow, Sergio works with indigenous communities and organizations in several continents, supporting capacity-building for the defense of their collective and territorial rights. Sergio studied International Development Economics at the Rheinisch-Westfälische Technische Hochschule Aachen (RWTH-Aachen, Germany) and Human Geography and Development Studies at the Open University in the United Kingdom.

Robert Ottenhoff
Robert is the president and CEO of the Center for Disaster Philanthropy. CDP seeks to transform how donors think about, respond and give to natural disasters. It offers information about disasters on its website and provides expert one-on-one analysis and strategic guidance to foundations and corporations. The Chronicle of Philanthropy recognized the launch of CDP as “one of the five high points of 2012.” Prior to joining CDP, Bob spent a decade as president and CEO of GuideStar, a leader in the use of providing high-quality data to help donors make better decisions and improve nonprofit practice. Before GuideStar, he served in executive positions in public broadcasting, including nine years as chief operating officer of the Public Broadcasting Service (PBS) and acting president. He frequently writes and comments on nonprofit and philanthropic issues on television, radio and newspapers.

Jeff Pace
Jeff is the Director of Finance and Operations and CFO of The Christensen Fund. Jeff joined Christensen in 2014 after twelve years in community development in the San Francisco Bay Area and more than twenty five years in finance and operations. Prior to Christensen, he was Chief Operating and Financial Officer at the Unity Council in Oakland. Before that, Jeff was the Chief Financial and Strategy Officer for Juma Ventures. Before these, Jeff volunteered with Greenpeace and the Sierra Club, and was a co-founder and early Board President of the Los Angeles County Bicycle Coalition. He serves on the Board of Directors for Confluence Philanthropy, the Board of Directors and the Finance Committee for the Peralta Colleges Foundation, and the Board of Directors of the Amah Mutsun Land Trust. Jeff received his BSBA degree from the University of Phoenix, and his MBA degree from UCLA’s Anderson School.

Zella Palmer
Zella is the Chair of the Dillard University Ray Charles Program in African-American Material Culture, an author, educator, filmmaker, and scholar. As Chair, Palmer is filming “The Story of New Orleans Creole Cooking: The Black Hand in the Pot” with Dillard University students, a documentary about the history and contributions of African-Americans to the world famous New Orleans Creole Cuisine, and authoring the Dillard University Cookbook. Previously, she served as a curator at the DuSable Museum of African American History in Chicago, and collaborated with the Southern Food & Beverage Museum in New Orleans, Art Gallery of Ontario, Royal Ontario Museum, and the City of Toronto Collections. Palmer serves on the advisory board for NOBIA (New Orleans Black Indians Alliance) and the Nellie Murray Feast Steering Committee. She is a culinary ambassador for Cuisine Noir Magazine. Palmer graduated from the University of Toronto with a Master’s Degree in Museum Studies.
Matthew Patsky
Matthew is CEO and a portfolio manager at Trillium Asset Management, leading the Sustainable Opportunities strategy. He has three decades of experience in investment research and investment management. Prior to joining Trillium, Matt was at Winslow Management Company in Boston, where he served as director of research, chairman of the investment committee and portfolio manager for the Green Solutions Strategy and the Winslow Green Solutions Fund. He was Director of Equity Research for Adams, Harkness & Hill and began at Lehman Brothers in 1984 as a technology analyst. He became the first sell side analyst in the United States to publish on the topic of socially responsible investing in 1994. Matt currently serves on the board of Environmental League of Massachusetts, Shared Interest, and Pro Mujer. He is a Chartered Financial Analyst. Matt holds a Bachelor of Science in Economics from Rensselaer Polytechnic Institute.

Jameela Pedicini
Jameela is a Director of Asset Management at Perella Weinberg Partners. Prior to joining PWP, Ms. Pedicini was Vice President of Sustainable Investing at the Harvard Management Company, where she was responsible for developing and leading its sustainable investment strategy. Prior to that, Ms. Pedicini was an Investment Officer at the California Public Employees’ Retirement System. Before working in the US, Ms. Pedicini worked in London for the UN supporting Principles for Responsible Investment as Manager of Investor Engagements, and Global Risk Analyst at Verisk Maplecroft. Ms. Pedicini currently serves on the Standards Council of the Sustainability Accounting Standards Board in San Francisco. Ms. Pedicini received a Bachelor of Arts in Psychology from Antioch University. She also holds a MSc in Sociology: Social Theory and Public Affairs from the University of Amsterdam and a MPhil in Comparative Social Policy from the University of Oxford.

Andrea Phillips
Andrea is the Founder and Managing Partner of Maycomb Capital, where she leads the development of The Community Outcomes Fund, a diversified outcomes-based financing fund that seeks to finance 12-14 projects across community issue areas primarily in the United States. The fund will provide impact investors with an opportunity to deploy capital to “next-generation” public-private partnerships, where financial returns are directly aligned with social impact and governments pay for what works. Prior to Maycomb, she was head of Goldman Sachs’s Social Impact Fund and Social Impact Bond investing, leading the team that developed, raised and managed the $138mm GS Social Impact Fund, the first of its kind by a US financial institution. She has an MPP from Harvard University, John F. Kennedy School of Government, and a BA from Tufts University.

Raúl Pomares
Raúl is the Founder of Sonen Capital LLC, where he operates across the firm’s overall business activities, while focusing on client management, business development and industry leadership. Prior to co-founding Sonen, Raúl served as a Managing Director at Springcreek Advisors, where he was in charge of the firm’s portfolio strategy. Previously, Raúl was a Portfolio Manager at Guggenheim Wealth Management, where he developed integrated multi-manager portfolios for institutional and high net worth clients. In particular, Raúl applied his expertise across a broad range of impact investment themes to create an integrated manager research and portfolio construction methodology for investors. Earlier in his career, Raúl co-founded a boutique wealth management firm where he directed client services and portfolio management. He has also served as an investment advisor, international private banker and consultant on behalf of global financial institutions and private investors.

Regan Pritzker
Regan is currently serving as President of the Libra Foundation, a family foundation founded by her parents in 2002. The Libra Foundation works to promote a world where all people are able to realize their full and unalienable rights, and live in a healthy environment and a peaceful and just society. As a board member, Regan has worked with the foundation’s advisors to develop an investment strategy to align all of the foundation’s capital with its philanthropic mission. She holds an M.A. in Education from the University of California at Berkeley, and a bachelor’s degree in Art History from Stanford University. In addition to the Libra Foundation, she also sits on the boards of Global Greengrants Fund and The Urban School of San Francisco. She lives in San Francisco with her husband and three teen-aged children, who keep her focused on positive change for the future.

Joohee Rand
Joohee is the Vice President for Community Investment and Strategy at the Santa Fe Community Foundation. She is responsible for Foundation’s program strategy and manages strategic initiatives including the Local Impact Investing Initiative. She is also Advisory Committee Chair of the New Mexico Impact Investing Collaborative currently in pilot phase. In her previous career, Joohee was a management consultant at McKinsey & Co, and a member of the Corporate Finance & Strategy Practice and the Nonprofit Practice. She also worked as an independent consultant for philanthropic and educational organizations in New Mexico, was an Executive Director at a San Francisco-based nonprofit focused on college access and financial literacy education for low-income youth, and worked as a Summer Associate at the Echoing Green Foundation in New York during her business school years. Ms. Rand holds a MBA from Harvard Business School, a MPP in International Economic Policy from Korea, and a BA in General Management from Thailand.

Lisa Renstrom
Lisa currently serves as Chair of the Board for Confluence Philanthropy and is a Board member at Bowwood Social Investments, ecoAmerica, and Interfaith Power & Light. She also chairs the Management Committee for Divest Invest’s campaign to engage individuals. She identifies as a Nebraskan, but a decade in the hotel industry in Mexico enhanced her world view while she focused on a business bottom line - not a triple one. Back in the US she discovered the concept of social returns, first as a local Sierra Club group chair, then Executive Director of Voice & Choices, later, as President of the National Sierra Club and Rachel’s Network. Her formal education derives from the University of Nebraska at Omaha, Owner President Management (OPM) at Harvard Business, and MC/MPA from the Harvard University Kennedy School of Government.

Jeff Rosen
Jeff is the Chief Financial Officer for the Solidago Foundation and its affiliated Foundations, where he oversees all of the financial systems as well as managing the MRI and PRI portfolios. Jeff is a graduate of Cornell University’s School of Industrial and Labor Relations and holds a Masters in Resource Economics and Policy from the University of Maine, where he worked to pioneer sustainability focused impact assessment techniques. He has worked in the private sector as a
serial entrepreneur, developing and selling food sector businesses, and as a chief financial officer for several restaurant chains and food manufacturers. He is an active, founding member of PVGROWS, a local food system collaboration located in Western Massachusetts, where he is part of a group focused on financing the regional food economy. Jeff is an Adjunct Faculty Member in the Antioch University Sustainable MBA program, where he has taught Ecological Economics for Social Entrepreneurs since 2007.

Lorenzo J. de Rosenzweig Pasqual
Lorenzo is President of the Mexican Fund for the Conservation of Nature. He was a Founding partner of the Exploration and Conservation Fund of National Geographic and Lindblad Expeditions and the Mesoamerican Reef Fund (MAR Fund). Between FMCN and MAR-Fund, he has mobilized close to $240 million for conservation since 1995; of this amount $125 million are endowment funds: $100 million for FMCN and $25 million for MAR-Fund. He has also contributed to the design and incorporation of learning and practice networks for the National Environmental Funds of Latin America and the Caribbean (RedLAC). He is a member of several boards and advisory councils, including Confluence Philanthropy, the Conservation Finance Alliance (CFA) Executive Committee, the Mexican Institute for Competitiveness (IMCO), the Mesoamerican Reef Fund, the Healthy Reefs Initiative, the Fund for Communication and Environmental Education, the Lindblad Expeditions-National Geographic Conservation and Exploration Fund, and the International Institute for Environment and Development (IIED).

Tracy Russ
Tracy is Managing Principal of SOLID (solid.today), a strategy development, communications, branding and engagement agency that connects people to change in the civic, public, philanthropic and cultural sectors. He has guided international local, regional and national initiatives to engage and empower people for change-making in areas ranging from climate change to re-inventing democratic systems, justice and equity issues. Tracy designs and deploys innovative brand experiences and interactive engagement processes that build value and advance purpose for people and cultures within for-profit enterprises, non-profit organizations and institutions, communities and advocacy efforts.

Richard Saines
Rick heads Baker & McKenzie’s North America Climate Change and Environmental Markets Practice and serves on the steering committee for the Firm’s Global Renewable Energy and Clean Technology Practice. He is widely published and globally recognized as a leading climate change lawyer, bringing over seventeen years of experience on climate change law matters advising governments, multinational companies, financial institutions, funds and project sponsors on the transition to a low carbon economy. He serves as Vice-Chair in the International Emissions Trading Association and served as a member of the World Economic Forum’s Global Agenda Council for Climate Change. In 2016, Rick was awarded Chevalier of the National Order of Merit by the President of the Republic of France for his significant contribution to the preparation of the Paris Climate Summit and the implementation of the Paris Agreement.

David Sand
David is Chief Investment Strategist and Chief Impact Investment Officer at Community Capital Management and primarily responsible for business development and the creation of new products. David has more than 35 years of investment management experience and is a trailblazer in the socially responsible/impact investing arena. In 1994, he co-founded Access Capital Strategies and served as its president and chief investment officer from 1994 to 2010. In this capacity, he pioneered the development of market-rate, fixed income impact

“We will either find a way, or make one.”

– Aníbal Barça
investments for institutional investors. He then worked as a consultant to Community Development Financial Institutions (CDFI’s), non-profits and social enterprises. David serves on the following boards: New York Advisory Board for Enterprise Community Partners, Croatan Institute, and AERIS®: The Information Service for Community Investors. He is also a former board member of U.S. SIF: The Forum for Sustainable Investment. He received his bachelor’s degree from Princeton University and a master’s degree in public administration from Harvard University’s John F. Kennedy School of Government.

Robert Sanders
Robert is Senior Finance Director for Clean Energy Group, where he provides analysis and designs and promotes finance strategies to engage multifamily affordable housing developers, municipalities and other project developers in community resilient power. With over twenty-five years of experience in community development and energy-related commercial finance, Rob Sanders has deep expertise in designing, implementing and evaluating financing programs, financial products and related services in the areas of clean energy and sustainable community development. Rob was formerly the Managing Director of Energy Finance for Reinvestment Fund, serving as Fund Manager for the Sustainable Development Fund, a $32 million fund created by the Pennsylvania PUC to promote renewable energy and energy efficiency. He also managed the Pennsylvania Green Energy Loan Fund and the Philadelphia metropolitan area EnergyWorks Loan Fund. As lead for all energy investing, he made loans, leases, equity investments and performance-based grant incentives, Rob holds an MCP from the University of California at Berkeley and a B.A. from Stanford University.

Jeff Scheer
Jeff is a Director and Partner at Pathstone Federal Partners, where he develops portfolio advice and handles day-to-day client-related operations for several high net worth individuals and non-profit clients. He is also a member of the firm’s Impact Investing Committee. Jeff’s prior experience includes the role of Senior Client Advisor at Federal Street Advisors. He is a Chartered Financial Analyst and a member of the Boston Security Analysts Society and holds a Bachelor of Arts degree in Economics from Union College.

Bonnie Scott Jones
Bonnie is Executive Director of Resources for Abortion Delivery (RAD), a new program that provides financial and technical support to abortion providers. Bonnie is also Senior Policy Advisor at the Advancing New Standards in Reproductive Health (ANSIRH) program at UCSF. Previously, Bonnie spent over two decades working on litigation, compliance, and regulatory issues with abortion providers, first at the Center for Reproductive Rights, and then in-house with a consortium of independent abortion facilities. Bonnie is a graduate of Yale Law School and Sarah Lawrence College.

Jason Scott
Jason is a Co-Managing Partner of Encourage Capital. Prior to Encourage, he co-founded EKO which merged with Wolfensohn Fund Management to form Encourage. Previously, Jason was a founding Director and investment analyst at Generation Investment Management. From 1999 to 2004, Jason worked with Acumen Fund, Flatiron Future Fund/Foundation and New Philanthropy Capital. Previously, Jason helped found and build Public Allies. In 1998, the Rockefeller Foundation selected Jason as a fellow in its Next Generation Leadership Program. He co-founded Cleantech for Obama and is currently on the boards of Oil Change International, Frankfurt Zoological Society and Public Allies. Jason also co-founded a network of family offices investing in Cleantech, Renewables and other Environmental Opportunities (called the CREO Syndicate). Jason graduated from Duke University and has an M.B.A. jointly from Columbia and London Business Schools.

Ruth Shaber
Ruth is the founder and president of the Tara Health Foundation, which promotes health, well-being and opportunity for communities and girls through innovative evidence-informed programs. Ruth had a robust career as a clinician and executive at Kaiser Permanente from 1990 to 2012. Her positions included chief of Obstetrics and Gynecology, director of Women’s Health for the Northern California division of Kaiser Permanente, founder of KP’s Women’s Health Research Institute and the Medical Director at the Kaiser Permanente Care Management Institute (CMI) from 2007 to 2012. She is chair of the board of directors at Jacaranda Health and on the Medical Advisory Committee for Planned Parenthood Federation of America.

Shuaib Siddiqui
Shuaib serves as the Director of Impact Investing at the Surdna Foundation, where he manages Surdna’s impact investing portfolio, leading an effort to better align the foundation’s investment policies and practices with its mission. Prior to Surdna, Shuaib spent nine years at Acumen where he most recently was the Director of Global Portfolio. He managed the organization’s global investment process, managed its global investment committee, and helped manage its $100m portfolio. He also directly managed a portfolio of companies and represented Acumen’s investment on several boards. Prior to Acumen, Shuaib worked for two years in the Quantitative Alpha Generation Group at Citadel Investment Group, a hedge fund based in Chicago, where he focused on developing trading strategies utilizing fundamental company data. Prior to that, he was an Assistant Vice President at Merrill Lynch working on The Global Analytic and Thematic Research team. He holds a BA in Economics from New York University.

David Simas
David is the CEO of the Obama Foundation and the Obama Presidential Center. A Taunton, Massachusetts native, David Simas received a bachelor’s degree in political science from Stonehill College and a doctor of law degree from Boston College Law School. In 2007, he was appointed Deputy Chief of Staff to Massachusetts Governor Deval Patrick. In 2009, Simas joined the Obama Administration as a Deputy Assistant to the President, working with senior advisors David Axelrod and David Plouffe. He then served as Director of Opinion Research for President Obama’s re-election. Simas most recently served as Assistant to the President and Director of the Office of Political Strategy and Outreach. He lives in Washington with his wife Shauna and two daughters, Payton and Rowan.

Morgan Simon
Morgan has spent the last decade in impact investment, emphasizing community accountability and ownership. She currently co-leads PI Investments, building a 100% impact portfolio. She also supports investment activity for the Libra Foundation. Morgan is co-founder and Chair of Transform Finance, bridging impact investment and social justice. Since its launch in 2014, the Transform Finance Investor Network has brought together over $2 billion seeking to invest...
with a more transformative lens. Morgan was the founding CEO of Tonic from 2010-2013, and the founding Executive Director of the Responsible Endowments Coalition from 2007 – 2009. Morgan is also very active as a board member for several organizations. She is on the investment committee for The Working World, co-chair of ROC United, and is a founding board member of Care Enterprises Inc. A graduate of Swarthmore College, she now serves as an adjunct professor at Middlebury College’s graduate school program.

Kathleen Simpson
Kathleen is the Chief Financial Officer for The Russell Family Foundation. Working closely with the program teams, she oversees investments of the endowment, financial planning, budget management, organizational development and performance measures. Kathleen has deep experience in business and financial management. Previously she was a Director of Finance for an independent wealth management company serving individuals, multigenerational families and foundations. Kathleen is a Certified Public Accountant and is earning her Masters of Business Administration from Washington State University. She has served as a Board member for several community organizations including Kitsap County Parks.

Timothy Smith
Timothy is the Director of ESG shareowner engagement at Walden Asset Management, and leads Walden’s ongoing shareholder engagement program to promote greater corporate leadership on environmental, social and governance (ESG) issues. He is co-chair of Walden’s ESG Research & Engagement Committee and a member of the Corporate Governance Committee. Prior to joining the firm in 2000, he served as executive director of the Interfaith Center on Corporate Responsibility (ICCR) for 24 years. He is a board member of the General Board of Pension and Health Benefits of the United Methodist Church. He serves on the boards of The Thirty Percent Coalition and Shared Interest, and is the chair of the Kimberly-Clark Sustainability Advisory Board. Mr. Smith earned a BA from the University of Toronto and masters of divinity degree from Union Theological Seminary.

Mark Spalding
Mark has been the President of The Ocean Foundation since its founding 15 years ago. Under his leadership, it has grown exponentially from a $200,000 to $7 million/year budget, as he prioritized its focus on steering the human relationship with the sea to a brighter future through diverse, carefully chosen strategies and projects. Mark is the advisor to the Rockefeller Ocean Strategy (an unprecedented ocean-centric investment fund), and designed the first-ever blue carbon offset program, SeaGrass Grow. Mark is serving on the Sargasso Sea Commission, and is a Senior Fellow at the Center for the Blue Economy, at the Middlebury Institute of International Studies. He holds a B.A. in history with Honors from Claremont McKenna College, a J.D. from Loyola Law School, and a Master in Pacific International Affairs (MPIA) from IR/PS. He is a graduate of the British School of Motor Racing.

Beatrice Stern
Since 2009, Beatrice has served as President of the Ralph E. Ogden Foundation, Inc., a family foundation located in Mountainville, NY. After an eight-month search process, the Foundation engaged a new Investment Advisor in June of 2016. Having committed to aligning 100% of its endowment with its mission by 2016, its Investment Committee is beginning to work with the new Investment Advisor to plan for a deliberative and prudent transition of its assets. Prior to taking on her position at the Ralph E. Ogden Foundation, Beatrice worked as a full-time partner in Dillon & Stern, Architects, and URBIO, S.A., architecture and planning firms working with communities involved in struggles over housing, tenure, and public space in both New York State and Panama. She attended The Putney School, and holds a Bachelors Degree from Oberlin College and a Master of Architecture from Rice University.

Terry Tamminen
Terry is the CEO of the Leonardo DiCaprio Foundation. From his youth in Australia to career experiences spanning the globe, Terry has developed expertise in business, farming, education, non-profit, the environment, the arts, and government. As the Chief Policy Advisor to Governor Schwarzenegger, Terry was the architect of many groundbreaking sustainability policies, including California’s landmark Global Warming Solutions Act of 2006, the Hydrogen Highway Network, and the Million Solar Roofs initiative. In 2010 Terry co-founded the R20 Regions of Climate Action, a new public-private partnership developed to implement measurable, large-scale, low-carbon and climate resilient economic development projects that can simultaneously solve the climate crisis and build a sustainable global economy. Since 2007 he has provided advice to Pegasus Capital Advisors and numerous global businesses on sustainability and “green” investing. In 2016, Terry joined the Leonardo DiCaprio Foundation as CEO. In addition to being an accomplished author, the Guardian ranked Terry No. 1 in its “Top 50 People Who Can Save the Planet.”

Marnie Thompson
Marnie is a Co-Managing Director of the Fund for Democratic Communities (F4DC), where she focuses on capacity-building for social justice activists and organizations and building a new kind of economy based in principles of cooperation, democracy, justice, and sustainability. This year, most of her efforts are focused on organizing funders in Shake the Foundations, strengthening the Southern Reparations Loan Fund, and providing technical assistance to the Renaissance Community Cooperative, a community-owned grocery store that eradicated a long-time food desert in low-income Northeast Greensboro.

Kristin Tracz
Kristin is the Gulf of Mexico Program Officer for the Walton Family Foundation, where she manages the foundation’s Coastal initiative, which works to ensure the funds resulting from the settlement of the 2010 oil spill litigation are used to support the best projects for restoring productive and resilient wetlands, barrier islands, oyster reefs and other natural systems within the Gulf of Mexico. In 2016, the Walton Family Foundation invested $14 million dollars into advancing restoration in the Gulf of Mexico. Kristin also serves as the national co-chair of the Greater New Orleans Funders Network and leads the Network’s Coastal Communities Action Table. Prior to joining the foundation, Kristin was a program officer for the Blue Moon Fund and an energy policy consultant for the Mountain Association for Community Economic Development (MACEC). Kristin has a Masters of Environmental Management from the Yale School of Forestry and Environmental Studies, and a B.A. in political and social thought from the University of Virginia.

Naomi Tsu
Naomi oversees the Southern Poverty Law Center’s (“SPLC”) legal and advocacy work on behalf of immigrants in the Deep South. She
represents clients who have experienced wage theft, discrimination, human trafficking and other abuses. She was counsel for immigrant workers in David v. Signal, one of the largest labor trafficking cases brought in the United States, which resulted in a $14 million jury verdict and for which her team was awarded Public Justice’s 2015 Trial Lawyer of the Year award. Naomi also litigates challenges to state anti-immigrant laws and policies, and she advocates at the federal and regional levels on behalf of immigrants’ civil and workplace rights. Prior to joining the SPLC, she graduated from Boalt Hall and clerked for Judge Betty Binns Fletcher of the U.S. Court of Appeals for the Ninth Circuit.

Vanessa Tucker
Vanessa is the Vice President for Analysis at Freedom House, where she oversees the organization’s annual publications (Freedom in the World, Freedom of the Press, Freedom on the Net, and Nations in Transit) and special reports. She previously directed Countries at the Crossroads, Freedom House’s survey of democratic governance in 70 strategically important countries around the world. Prior to joining Freedom House, Vanessa managed the Program on Intrastate Conflict at Harvard Kennedy School, where she contributed to the inaugural edition of the Ibrahim Index of African Governance. She has also worked at the Kennedy School’s Women and Public Policy Program, and with the Democracy Program at the Carter Center. She holds a BA in international development from McGill University and an MA in international relations from Yale University.

Linda Usdin
Linda’s career focuses on facilitating/promoting large-scale community-driven change. In the last twelve years, she has helped match the strategic interests of philanthropic organizations with the needs and capacity of communities, non-profits and governmental agencies. She has advised the Ford, Annie E. Casey, Open Society, Conrad N. Hilton, Louisiana Disaster Recovery, and Greater New Orleans foundations. Dr. Usdin founded several social justice organizations, including Urban Youth Against Violence and The New Orleans Coalition on Open Governance. In 2012, Dr. Usdin was awarded a Bellagio residency from Rockefeller Foundation. She has served on an advisory committee for the National Academies Institute of Medicine, is the Chair of the Board of Propeller: A Force for Social Innovation, and on the Board of the Louisiana Public Health Institute. Dr. Usdin has a Dr.P.H. from the international health department at Tulane School of Public Health and Tropical Medicine where she is on the adjunct faculty.

Emery Van Hook Sonnier
Emery is the Director of the Link Stryjewski Foundation. A native New Orleanian, Sonnier began her career at Dickie Brennan & Co. restaurant group, working her way up to Director of Marketing. She earned her Masters in Food Studies from New York University and worked as an editor at Food & Wine magazine before returning home to New Orleans to join Market Umbrella, a 501(c)3 that operates farmers markets and advocates for healthy food access. In 2016, Sonnier was named Foundation Director of the Link Stryjewski Foundation, created by chefs Donald Link and Stephen Stryjewski to address poverty and violence in New Orleans by investing in youth development programs. Sonnier holds a Bachelor of Arts from Rhodes College. She has served on the New Orleans Food Policy Advisory Committee, the Fit NOLA Steering Committee and the Advisory Council for Louisiana Sustainable Agriculture Research & Education.

Mariela Vargova
Mariela is a Senior Vice President with the Sustainability and Impact Investing team of Rockefeller Asset Management. She focuses on the integration of environmental, social and governance factors in the investment process and is responsible for corporate engagement strategies and external collaborations. Prior to joining Rockefeller & Co. in 2005, Mariela had an extensive academic experience in the social sciences. Before then she worked in Eastern Europe on a non-governmental project for the Open Society Institute. Currently, Mariela sits on the Principles for Responsible Investments (PRI) Investor Engagements Advisory Committee, Mariela holds an M.A. in Political Science from Sofia University, Bulgaria, and an M.A. and a Ph. D. in Political Science from the New School for Social Research, New York.

Nashieeli Valencia Núñez
Originary of Ixtépec, member of the Zapotec/Binnizá people of the Istmus of Tehuantepec, Nashieeli was trained in Community Cultural Regeneration by the Universidad de la Tierra Oaxaca and in Cultural Management by the Mexican National Council for Culture and Arts (CONACULTA) and the Oaxacan Institute for Cultures (IOC). She has actively participated for more than 20 years in different organizational and cultural processes in her region, where she initiated and led different organizations, including indigenous women’s organizations, and the initiative to establish a community wind energy project in Ixtépec. Her work is primarily focused on women and community groups that defend the indigenous culture, collective rights and territories. She is currently part of the Collective “Women in Community” of Oaxaca, of the Articulation of Indigenous Peoples of the Istmus of Tehuantepec in Defense of the Territory, of the Oaxacan Network of Indigenous Women and of the Network of Women Activists and Defenders in Oaxaca.

Clara Vondrich
Clara is the Global Director of Divest-Invest Philanthropy. In this role, she manages the foundation sector for the broader Divest-Invest movement, which now spans universities, sovereign wealth funds, cities, pension funds, insurance companies, health organizations, faith groups and individuals. Prior to Divest-Invest, Clara served as Account Director for Climate & Energy at Fenton Communications. Before joining Fenton, Clara was Director of Leadership Initiatives at the ClimateWorks Foundation. An attorney by training, Clara formerly served as Counsel to the President’s Commission on the BP Deepwater Horizon Oil Spill, before which she specialized in international arbitration at the law firm Arnold & Porter. Clara clerked on the U.S. Court of Appeals for the Tenth Circuit after graduating from the University of Virginia Law School in 2006. She sits on the Board of Directors of 2 Degrees Investing Initiative.

Aaron Walker
Aaron is founder and CEO of Camelback Ventures. Camelback leads a social venture fellowship that levels the playing field for underrepresented entrepreneurs by providing access to coaching, connections and capital. Aaron is on a journey to live in the spirit of his baseball hero, Jackie Robinson, who said “a life is not important except in the impact it has on other lives.” With this ethos, Aaron taught ninth grade English in West Philadelphia through Teach For America, put together deals for companies large and small as a lawyer at Allen & Overy, and supported new ideas to improve education as a portfolio director for the NYC Fund for Public Schools. Aaron is humbled to say that he graduated from the University of Virginia and Penn Law
School. He also knows that this doesn’t entitle him to anything and is ready to earn his keep. Aaron was lucky (and smart) enough to marry an amazing woman and is blessed with two children, Langston and Amara.

Sherece West-Scantlebury
Sherece is the President and CEO of the Winthrop Rockefeller Foundation, a private, independent foundation whose mission is to improve the lives of all Arkansans in three interrelated areas: economic development; education; and economic, racial, and social justice. Involved in philanthropy for over 20 years, Dr. West-Scantlebury served as CEO at the Foundation for Louisiana and as a program associate at the Annie E. Casey Foundation. Her professional career includes nearly 30 years of experience in community development, public policy and advocacy, and public service. In addition to running the Winthrop Rockefeller Foundation, Dr. West is active in a number of nonprofits and philanthropy organizations. She has a PhD (Public Policy) from the University of Maryland; her MA (Public Policy) from the University of Michigan - Gerald R. Ford School of Public Policy, and her BA from Bowie State University.

Michelle Whetten
Michelle is Vice President and Gulf Coast Market Leader for Enterprise Community Partners, Inc. She is based in New Orleans, where Enterprise has invested over $320 million in loans, grants and equity towards the production of over 9,300 affordable homes since Hurricane Katrina. Michelle leads Enterprise’s work to create and support effective systems and tools for high quality affordable housing production, attract private-sector capital and strengthen the affordable housing industry. Prior to the Gulf Coast, Michelle was Deputy Director for Enterprise’s New York office. Before Enterprise, Michelle managed the Prince George’s County, MD, Office of the Neighborhood Design Center, a Baltimore-based nonprofit organization. Michelle serves as chair of the Federal Home Loan Bank of Dallas Advisory Council and on the boards of Reconcile New Orleans, Louisiana Housing Alliance, Gulf Coast Renaissance Corporation and Springboard To Opportunities. Michelle graduated from the University of California, Davis with a Bachelor of Science, and received a Master’s Degree from the University of Illinois.

Kate Wolford
Kate is President of The McKnight Foundation, a Minnesota-based family foundation that seeks to improve the quality of life for present and future generations through grantmaking, collaboration, impact investing, and strategic policy reform. During her tenure since 2006, she has spearheaded the development of the Foundation’s climate mitigation and sustainability efforts, and its impact investing program including earmarking $200 million for higher impact investments; developing a new lower carbon investment product; and promoting impact investing as a tool for learning among grantmaking staff. Prior to joining McKnight, Wolford spent 13 years at Lutheran World Relief (LWR) where she was named president after two years as program director for Latin America. Wolford has a B.A. in history from Gettysburg College, an M.A. in public policy from the University of Chicago, and an M.A. from the Divinity School of the University of Chicago.

Richard Woo
Richard is the Chief Executive Officer of the Russell Family Foundation. He joined the Foundation in 2000, and collaborates with the Board of Directors to guide the foundation’s strategic planning, programs and community affairs. Prior to arriving at the Foundation, he spent many years working in nonprofit organizations and business in California. As the former executive director of the Levi Strauss Foundation, Richard has experience in global philanthropy and corporate social responsibility.

Joshua Zinner
Josh is the Chief Executive Officer of the Interfaith Center on Corporate Responsibility. Josh comes to ICCR with 25 years’ experience as a nonprofit leader, coalition-builder and policy advocate. Prior to the ICCR, Josh co-directed the New Economy Project. Among earlier roles, Josh founded and ran the Foreclosure Prevention Project at South Brooklyn Legal Services, and he helped to build and lead the New Yorkers for Responsible Lending coalition. Previously, he worked with Oxfam America on private sector campaigns including access to medicines work; as a housing lawyer with low-income seniors; and as a social worker for five years working with adjudicated youth, street children, and homeless adults. He is currently on the Community Advisory Board of the Consumer Financial Protection Bureau.
**SPECIAL GUESTS**

**Joshua Humphreys**  
Joshua is President and Senior Fellow of Croatan Institute. A leading authority on sustainable, responsible, and impact investing, Dr. Humphreys has taught at Harvard, Princeton, and NYU, and held numerous appointments as a Fulbright Scholar in Paris, an Aspen Environment Forum Scholar, associate fellow of the Rutgers Center for Historical Analysis, scholar-in-residence at the Rockefeller Archive Center, visiting research associate at the Johns Hopkins School of Advanced International Study, and fellow at Tellus Institute. For more than a decade and a half, Dr. Humphreys has advised numerous businesses, nonprofits, foundations, community and labor groups, policymakers and multilateral organizations on sustainability and finance. His insights on trends in philanthropy, investor engagement, and impact investing have been widely published and regularly cited in the press. He serves on the advisory boards of Dwight Hall’s SRI Fund at Yale University, the Responsible Endowments Coalition, and the Coalition for Responsible Investment at Harvard.

**Andrew Jones**  
Drew is Co-Founder and Co-Director of Climate Interactive, a top-rated climate change and energy think tank that creates accessible, policy-mailer-oriented simulations. An expert on international climate and energy issues, his quotes and interactive data stories appear frequently in the New York Times, The Washington Post, and other media. Jones and his team at CI and MIT Sloan developed “C-ROADS”, the user-friendly climate simulation in use by thousands of climate analysts around the world. Trained in system dynamics modeling at Dartmouth College and through a M.S. at MIT, Jones co-accepted the “AisyT Prize” for “a significant accomplishment achieved through the application of systems thinking to a problem of U.S. national significance” and won Dartmouth College’s Ray W. Smith award for the most significant contribution to the status of the College. He teaches Systems Thinking and Sustainability at MIT and UNC Chapel Hill’s Kenan Flagler Business School.

**Bryan Lee**  
Bryan is a design justice consultant and currently serves as the Place + Civic Design Director for the Arts Council of New Orleans. With a background in architecture, Lee is tasked with creating, advocating for, and contribute to, the creative intervention of public art and social impact design in civic spaces across New Orleans. Before joining the Arts Council, Mr. Lee spent time at 2014 AIA National Firm of the Year, Eskew+Dumez+Ripple (Architecture) in New Orleans. Mr. Lee leads two award winning architecture + design programs for high school students through the Arts Council and the National Organization of Minority Architects Louisiana Chapter, respectively. He serves on several boards including the National NOMA board as the Design Education Chair and on the National AIA Diversity and Inclusion Committee. He was selected as the 2014 NOMA member of the year, 2015 Next City Vanguard Fellow, 2015 International British American Project Fellow. Bryan has given TED Talk and a SXSW Eco Keynote on Design Justice.

**Thomas Neyhart**  
Thomas serves as CEO of PosiGen, a leading provider of residential solar PV and energy efficiency solutions. Founded in 2011, PosiGen’s mission is to make a positive financial impact on customers’ lives by providing green energy solutions to low-to-moderate income homeowners. PosiGen currently serves 9,500 homeowners in New York, Connecticut, Florida and Louisiana with plans for rapid expansion. PosiGen has been on the Inc.5000 Fastest Growing Private Companies List for 3 years in a row. The energy solution provider was awarded the Patriotic Employer Award by the Office of the Secretary of Defense and the Blue Ribbon Award from the U.S. Chamber of Commerce. In 2015, PosiGen was named one of 27 Coolest New Businesses in New Orleans by Business Insider. Mr. Neyhart was named one of Goldman Sachs’ 100 Most Intriguing Entrepreneurs of 2014. He is an invited speaker at renewable energy and construction business forums and a sustaining member of the Society of American Military Engineers.

**Jessica Norwood**  
Jessica is a nathan cummings foundation fellow and the founder of the Runway Project. The Runway Project uses entrepreneurship as a way to close the wealth gap in Black communities by providing pre-seed, friends and family money or what Jessica calls “believe in you money” to startup businesses. Jessica is a former BALLE Fellow for local economies and speaks worldwide on the intersection of culture and investing, emerging leadership, voting rights, community investing and rural wealth creation. She is lifelong Fellow of the Sanford School of Public Policy at Duke University and Southern University College of Business, as well as the Political Power Fellow of the Hip Hop Archive at the DuBois Institute of Harvard University.

**Martin von Hildebrand**  
Martin is the Director and Founder of Gaia Amazonas. Since 1970, he has worked to defend and promote the rights of the Indigenous Peoples and to the conservation of the rain forest in the Colombian Amazon resulting in the Indigenous People now owning 26 million hectares of Amazon Forest with their own governmental system officially recognized by the State as Public Entities. His is currently working on the TRIPLE A (Andes-Amazon-Atlantic) Eco-Cultural Corridor: A Macro-regional Initiative hoping to re-establish and maintain connectivity between the Andes-Amazon- Atlantic ecosystems, to guarantee biodiversity and ecosystem services of the Amazon basin, and to bolster innovative solutions to climate change. He has received many accolades including Colombia’s National Environmental Prize in 1999, the Swedish Right Livelihood Award in 1999, the Skoll Foundation’s Social Entrepreneur Award in 2009 and the World Economic Forum Social Entrepreneur Award in 2009.

**Tracie Washington**  
Tracie is a very proud native New Orleanian, and graduate of Carleton College (BA, Political Science), Drake University (MPA), The University of Texas School of Law, and the University of New Orleans (Master of Business Administration). For over 25 years Tracie has maintained a general civil practice concentrated in civil rights, education law, and labor/employment law. Tracie has concluded the Fellowship in Effective Leadership, and served as a Loyola University Institute of Politics Fellow for 2010-2011. She was selected as an American Arbitration Association Higginbotham Fellow for 2011-12, awarded the Carleton College Distinguished Achievement Award, and named Trial Lawyer of the Year by the Public Justice Foundation. Tracie was named by MSNBC’s TheGrio, as one of its 100 History Makers in the Making, and The Root named Tracie one of its Twenty Leading Black Women Advocating Change. She was featured in Spike Lee’s documentary “If God is Willing and Da Creek Don’t Rise,” and has been interviewed on national talk shows including MSNBC’s Rachel Maddow Show and PBS NewsHour.
PROGRAM AREAS AND WORKING GROUPS

In service to our motto, ‘Own What You Own,’ Confluence serves as the primary driver of philanthropic discussion about mission related investing. We organize more than 20 educational events per year that expand the field.

PROGRAM AREAS

Sustainable Food Systems
Based around food systems, food security, and sustainable livelihoods, this program area educates and engages investors and advisors through ongoing webinars and strategic roundtable discussions. Topics include sustainable fisheries and aquaculture; holistic rangeland management; food systems and the supply chain, local agriculture, and more.

Native Green Learning Circle
The Native Green Learning Circle shares best practices about investments with Indigenous communities. The group brings together foundations, public funding agencies, and investment managers to explore the intersection of impact investing and community development in Native America.

Water Investors
The Water Investors Summit gathers each year in a different region of the United States to explore the challenges and opportunities for investing in that locale, as well as larger trends within the public portion of the portfolio. The next Water Investors Summit will be held October 11-13 in Minneapolis, Minnesota.

WORKING GROUPS

Several Program Areas have crystallized into Working Groups, largely as a result of the initiative of motivated individuals. Appreciation for their leadership!

Climate Solutions Collaborative (C2C)
In the spring of 2015 Confluence, which helped to launch the Divest-Invest Campaign and has led more than 40 climate-related learning events over the past five years, joined with CREO Syndicate to create the Climate Solutions Collaborative (C2C). Bringing together Confluence Philanthropy and CREO Syndicate memberships, C2C’s goal is to accelerate investments in climate solutions through investor sharing and collaboration. The Collaborative is launching a challenge campaign to deploy $3 billion in climate related investments by 2025. Join us in the plenary room on Thursday afternoon for this special announcement.

Rainmakers Investment Collaborative
Mission related investors in the Rainmakers Investment Collaborative are using a consensus-based process to build a Program-Related Investment Initiative that benefits Pueblo, Navajo, Hopi, and Apache communities throughout New Mexico and Arizona. The goal of this project is to raise at least $2 million within two years to provide below market rate loans and grants for sustainable community development, tribal social enterprise, agriculture, and affordable housing in these communities. Join us for lunch on Wednesday afternoon to learn more about The Rainmakers opportunity.

Active Owners Working Group
The Policy Engagement Working Group focuses on the role of money in our political system; how funders and investors can work together to promote governmental and corporate transparency and accountability; and fair and equitable representation in the political process. This group uses educational programs, network building, and cross-sector collaboration to promote the use of asset ownership as a tool for strengthening our democracy. From established responsible investing strategies like shareholder engagement and proxy voting to emerging issues including campaign finance reform and corporate disclosures, the Policy Engagement Working Group creates a community of practice for bringing dark money in politics to the light. Join us on Wednesday morning for breakfast and large group discussion in the plenary room.
ACKNOWLEDGEMENTS

The Confluence Practitioners Meeting is created through a unique democratic process. Members of the Practitioner Program, propose concepts that are then voted on by the Practitioner and Advisor Program Members. The most popular sessions become the plenaries; the runners-up become small sessions. The individuals who proposed selected sessions are invited to help to plan those sessions.

We would like to both congratulate and thank those Members and investment advisors who have helped to shape the 7th Annual Practitioners’ Gathering, as well as everyone else whom we have relied upon for vision and expertise. We look forward to our best event yet!

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GRAPHIC DESIGNER

Mad Dog Graphx (Seattle)

I refuse to accept the view that mankind is so tragically bound to the starless midnight of racism and war, that the bright daybreak of peace and brotherhood can never become a reality... I believe that unarmed truth and unconditional love will have the final word.

– Martin Luther King, Jr.
And Still I Rise

You may write me down in history
With your bitter, twisted lies,
You may tread me in the very dirt
But still, like dust, I’ll rise.

Does my sassiness upset you?
Why are you beset with gloom?
’Cause I walk like I’ve got oil wells
Pumping in my living room.

Just like moons and like suns,
With the certainty of tides,
Just like hopes springing high,
Still I’ll rise.

Did you want to see me broken?
Bowed head and lowered eyes?
Shoulders falling down like teardrops.
Weakened by my soulful cries.

Does my haughtiness offend you?
Don’t you take it awful hard
’Cause I laugh like I’ve got gold mines
Diggin’ in my own back yard.

You may shoot me with your words,
You may cut me with your eyes,
You may kill me with your hateful Lies,
But still, like air, I’ll rise.

Does my sexiness upset you?
Does it come as a surprise
That I dance like I’ve got diamonds
At the meeting of my thighs?

Out of the huts of history’s shame
I rise
Up from a past that’s rooted in pain
I rise
I’m a black ocean, leaping and wide,
Welling and swelling I bear in the tide.
Leaving behind nights of terror and fear
I rise
Into a daybreak that’s wondrously clear
I rise
Bringing the gifts that my ancestors gave,
I am the dream and the hope of the slave.
I rise
I rise
I rise.

– Maya Angelou