DISRUPT
THE NOW
#OWNWHATYOUOWN

MARCH 12th – 15th, 2018
Berkeley Marina Hotel, Berkeley, CA
# AGENDA OVERVIEW

## Time Slots

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday, March 12, 2018</th>
<th>Tuesday, March 13, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30</td>
<td>Registration Opens</td>
<td>Morning Meditation</td>
</tr>
<tr>
<td>8:00</td>
<td>(7:30 – 8:30 AM)</td>
<td>(8:00 – 8:30 AM)</td>
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<tr>
<td>8:30</td>
<td>Practitioners Institute &amp; Breakfast</td>
<td>Learners Institute &amp; Breakfast</td>
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<tr>
<td>9:00</td>
<td>(8:45 AM – 12:00 PM)</td>
<td>(9:00 AM – 12:00 PM)</td>
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<tr>
<td>9:30</td>
<td>Welcome Intensive</td>
<td>FIELD TRIPS</td>
</tr>
<tr>
<td>10:00</td>
<td>(1:00 – 5:00 PM)</td>
<td>(Pre-Registered Attendees Only)</td>
</tr>
<tr>
<td>10:30</td>
<td>Welcome Intensive</td>
<td>(12:15 – 4:00 PM)</td>
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<tr>
<td>11:00</td>
<td>Confluence Partner Event: Invest Well, Live Well: The Buen Vivir Fund (6:00 – 9:00 PM) Hosted by Thousand Currents</td>
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<tr>
<td>11:30</td>
<td>Gratitude Dinner</td>
<td>Opening Reception on the Lawn</td>
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<tr>
<td>12:00</td>
<td>(Invitation Only)</td>
<td>(6:00 – 7:00 PM)</td>
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<tr>
<td>12:30</td>
<td>Welcome Intensive</td>
<td>Opening Dinner</td>
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<td>1:00</td>
<td>(6:30 – 8:30 PM)</td>
<td>(Onsite)</td>
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<td>1:30</td>
<td>Gratitude Dinner</td>
<td>(7:00 – 9:30 PM)</td>
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<td>Welcome Intensive</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.
## AGENDA OVERVIEW

### Time Slots

<table>
<thead>
<tr>
<th></th>
<th>Wednesday, March 14, 2018</th>
<th>Thursday, March 15, 2018</th>
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<tbody>
<tr>
<td>7:30</td>
<td>Registration Opens &amp; Breakfast (7:30 – 8:30 AM)</td>
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<tr>
<td>8:00</td>
<td>Active Owners Working Group Breakfast (7:30 – 8:30 AM)</td>
<td>C2C Leadership Breakfast (7:30 – 8:30 AM)</td>
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<tr>
<td>8:30</td>
<td>Morning Meditation (7:45 – 8:15 AM)</td>
<td>Morning Meditation (7:45 – 8:15 AM)</td>
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<tr>
<td>9:00</td>
<td>Welcome (8:30 – 8:45 AM)</td>
<td>Morning Introduction (9:00 – 9:15 AM)</td>
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<tr>
<td>9:15</td>
<td>Keynote (8:45 – 9:15 AM)</td>
<td>Keynote (9:15 – 9:45 AM)</td>
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<tr>
<td>10:00</td>
<td>Plenary (9:15 – 10:15 AM)</td>
<td>Plenary (9:45 – 11:15 AM)</td>
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<tr>
<td>10:30</td>
<td>Break (10:15 – 10:30 AM)</td>
<td>Break (11:15 – 11:30 AM)</td>
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<tr>
<td>11:00</td>
<td>Morning Meditation (7:45 – 8:15 AM)</td>
<td>6 Concurrent Sessions (11:30 AM – 12:45 PM)</td>
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<tr>
<td>11:30</td>
<td>Community Reflections (11:30 AM – 12:00 PM)</td>
<td>Special Luncheons (12:00 – 1:30 PM)</td>
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<tr>
<td>12:00</td>
<td>Lunch (12:00 – 1:30 PM)</td>
<td>Lunch (12:45 – 2:00 PM)</td>
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<tr>
<td>12:30</td>
<td>Special Luncheons (12:00 – 1:30 PM)</td>
<td>Special Luncheons (12:45 – 2:00 PM)</td>
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<tr>
<td>13:00</td>
<td>6 Concurrent Sessions (Choose One) (1:30 – 2:45 PM)</td>
<td>Membership Meeting (2:00 – 3:00 PM)</td>
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<tr>
<td>1:00</td>
<td>Free Time (2:45 – 5:15 PM)</td>
<td>Post-Conference Events and Working Group Meetings (3:00 – 5:00 PM)</td>
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<tr>
<td>3:30</td>
<td>Early Bus Departure for YBCA (4:00 PM)</td>
<td>Special Events (3:00 – 4:30 PM)</td>
</tr>
<tr>
<td>4:30</td>
<td>Special Events (3:00 – 4:30 PM)</td>
<td>Special Sessions at YBCA (4:30 – 6:00 PM)</td>
</tr>
<tr>
<td>5:00</td>
<td>Depart by Bus for YBCA (5:15PM)</td>
<td>Evening Plenary at YBCA (6:00 – 7:30 PM)</td>
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<tr>
<td>5:30</td>
<td>Strolling Dinner and Disruptive Fashion Party at YBCA (7:30 – 9:30 PM)</td>
<td>Strolling Dinner and Disruptive Fashion Party at YBCA (7:30 – 9:30 PM)</td>
</tr>
<tr>
<td>6:00</td>
<td>Return to Marina Hotel</td>
<td>Join a Thematic Conference Track!</td>
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<tr>
<td>6:30</td>
<td></td>
<td>Social Equity Track</td>
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<tr>
<td>7:00</td>
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<td>Active Owners Track</td>
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<td>7:30</td>
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<td>Climate Track</td>
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<tr>
<td>8:00</td>
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<td>#OWNWHATYOUOWN</td>
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GETTING TO THE HOTEL & CONFERENCE SITE

GETTING TO THE HOTEL & CONFERENCE SITE
DIRECTIONS TO BERKELEY MARINA HOTEL FROM SFO:

DRIVING DIRECTIONS
FROM SAN FRANCISCO INTERNATIONAL AIRPORT & SAN FRANCISCO:
Take 101 North to I-80 East across the Bay Bridge. Follow I-80 toward Berkeley/Sacramento. Exit at Powell St. toward Emeryville. Left at Powell St. Right at Frontage Rd. Left at University Ave to Marina Blvd. Turn right onto Marina.

Distance from Hotel: 22 miles

Typical Minimum Charge from SFO to Berkeley:
• BART to Ashby Station + Taxi to Hotel: Approximately $22
• Super shuttle: $35
• Lyft: Approximately $40
• Traditional Taxi: Approximately $80

FROM OAKLAND INTERNATIONAL AIRPORT & FROM THE SOUTH:
Take I-880 North. Follow signs for I-80 North toward Sacramento/Berkeley. Exit at Powell St. toward Emeryville. Left at Powell St. Right at Frontage Rd. Left at University Ave to Marina Blvd. Turn right onto Marina.

Typical Minimum Charge from OAK to Berkeley:
• BART to Ashby Station + Taxi to Hotel: Approximately $9
• Lyft: Approximately $20
• Super Shuttle: $25
• Traditional Taxi: $40

FROM THE NORTH:
Take I-580 E/I-80 W toward Oakland/San Francisco. Take exit 11 for University Avenue. Left at University Ave to Marina Blvd. Turn right onto Marina.

HOTEL PARKING
The Berkeley Marina Hotel offers parking at their lot on-site. Self-parking is $20 per day, valet is $24. Rates are subject to change without notice. Daytrippers may park across the street in the Park’s free parking areas. No overnight parking. Keep valuables hidden.
ABOUT OUR LOCATION

BERKELEY AND THE EAST BAY
San Francisco’s vibrant East Bay hosts miles of scenic coastline, a world class university, redwood forest parks, a thriving arts community and a world-famous culinary scene.

It’s also a focal point at the intersection of corporate growth, technological development, social justice, civic identity and wealth disparity. The East Bay is an ever-evolving experiment in disruption.

HOTEL AMENITIES
The Bay Grille & Bar provides waterfront dining, featuring California cuisine served daily by menu.

An outdoor patio with firepits is also available for guests to enjoy views of the Bay. Bring cozy outdoor wear for your free time.

MAP OF EAST BAY & HOTEL LOCATION
CONFERENCE LOGISTICS

BERKELEY MARINA HOTEL
Stay, Play and Convene Near the Berkeley Marina

Berkeley Marina Hotel
200 Marina Blvd | Berkeley, CA 94710 | (510) 548-7920

Uniquely situated in San Francisco Bay, the hotel has expansive views of the Bay, the Oakland hills and the San Francisco skyline. Quiet and private, attendees can enjoy walks around the marina, borrow a hotel bike for a quick trip along the Bay Trail or relax around a fire pit on the patio.

FLOOR PLAN OF CONFERENCE SPACE & HOTEL
CONFERENCE SPECIAL EVENTS

TUESDAY, MARCH 13
6:00 PM to 7:00 PM – Hotel Lawn
Welcome Reception

WEDNESDAY MARCH 14
12:15 PM to 1:30 PM
Foundation Investments in Native America Luncheon
– Amador
Reproductive Rights Luncheon – Mariposa

WEDNESDAY, MARCH 14
3:00 PM TO 5:00 PM – Bayview Ballroom
Afternoon Fiesta! – Join Sonen Capital and Fondo de Fondos in a social conversation about investing in Latin America.

WEDNESDAY, MARCH 14
6:00 to 9:30 PM
Yerba Buena Center for the Arts, San Francisco
Confluence Gala: Art, Culture and Impact

THURSDAY, MARCH 15
12:45 PM to 2:00 PM
Impact Investing in Sustainable Land Use Luncheon
– Angel
Investing in Racial Equity Luncheon – Mariposa

LOOK WHO’S HERE!
Total speakers: 154
% women: 51%
%POC: 29%

ATTENDEES
Asset Managers, Advisors, or Companies: 28%
Investors: 60%
Resource Experts: 12%

AUM
Advisors: $2,645,975,099,918
Investors: $47,500,193,070
ABOUT US

MISSION DRIVEN
SOCIAL JUSTICE
COMMUNITIES
EQUITY
SUSTAINABILITY
DEMOCRACY

"Should you find yourself in a chronically leaking boat, energy devoted to changing vessels is likely to be more productive than energy devoted to patching leaks."

– Warren Buffett

CONFLUENCE PHILANTHROPY

Confluence Philanthropy advances mission-related investing. We support and catalyze a community of private, public and community foundations, individual donors, and their values-aligned investors representing more than $79 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 a diversity of institutions, charitable asset types, personal and professional roles, and programmatic missions, but 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.
JOIN THE PRACTITIONER INVESTOR PROGRAM

Confluence serves a wide spectrum of investor members, including those recently 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 Investor 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.

The 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 with philanthropy.

Benefits of Practitioner Investor Membership

<table>
<thead>
<tr>
<th>COMMUNITY</th>
<th>RESOURCES</th>
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<tbody>
<tr>
<td>Participation in a community of truly leading philanthropic grantmakers, donors, and public, private, community and family foundations</td>
<td>One complimentary registration to the Annual Practitioners Gathering and membership pricing for additional representatives and family members</td>
</tr>
<tr>
<td>Priority registration to the 20+ webinars and in-person events Confluence organizes each year</td>
<td>Priority access to Confluence staff and services</td>
</tr>
<tr>
<td>Speaking opportunities at Confluence events or on webinars</td>
<td>Access to topical membership listservs</td>
</tr>
<tr>
<td>Join one of Confluence’s working groups</td>
<td>Membership discounts to investor events and consultant resources (when available)</td>
</tr>
<tr>
<td>Authentic collaboration among thought leaders in the field of mission-related investing</td>
<td>Individual technical assistance from Confluence’s CEO and senior staff</td>
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<tr>
<td>A pathway to leadership within Confluence, such as Board or Steering Committee participation</td>
<td>Access to a community of practice that shares costs in building and maintaining collaborative funds</td>
</tr>
<tr>
<td>Serve as a spokesperson for the field at Confluence co-sponsored events</td>
<td>Enjoy our exclusive Membership Library, featuring over 250 publications, resource guides, Confluence webinar recordings and presentations.</td>
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<tr>
<td>Submit session and plenary topics for the Annual Practitioners Gathering (selected for final agenda by vote of the membership)</td>
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</table>

Apply to become a Practitioner Investor Member!

Foundations and individual donors are welcome to apply for membership by contacting David Estrada, Partnership Strategy Director, at david@confluencephilanthropy.org Practitioner Investor Membership contributions are determined on a sliding scale according to organizational asset size.
BECOME AN ADVISOR MEMBER

Through our Advisor Membership Program, investment advisors and managers who are committed to mission alignment participate directly in the Confluence community, 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 community, industry spokespersons, and partners in leading philanthropy.

Confluence supports mission-aligned investment advisors, asset managers, consultants and intermediaries through three distinct membership categories: The Practitioner Advisors Membership, the Associate Advisors Membership, and the Affiliate Advisors Membership. Advisors are invited to apply and join Confluence through a peer referral process.

Practitioner Advisor Membership is reserved for the most seasoned, ‘high impact’, investment advisors, asset managers, and intermediaries in the industry. These firms have a solid track record supporting mission-driven investors and a clear institutional commitment to impact. Confluence’s membership committee selects a small group of new members into this category each year through a competitive application process.

Practitioner Advisors must hold a minimum four-year track record in mission-related investing and have three referrals from
foundations or other members of our network. To ensure that firms are a good fit for Practitioner Advisor membership, all incoming advisors join first as Associate Advisors before being considered for Practitioner membership. They must then complete an application which is 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.

**Associate Advisor** Membership is designed for investment advisors and asset managers that support philanthropic clients and are either building their ESG or impact strategy or building a relationship with Confluence. Confluence prioritizes new associate members who have at least two years of experience serving philanthropic clients, a significant portion of their total AUM invested in mission related investments and demonstrate a commitment to diversity through women and people of color in ownership or leadership positions.

**Affiliate Advisor** Membership is designed for community development financial institutions (CDFIs) and consultants who specialize in mission related investing but do not directly manage assets. This includes both individual and institutional impact investing consultants.

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**Protec**

**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.

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**Advisor Membership Program Benefits**

All Advisor members benefit from the following educational programming, collaborative convenings and technical support:

- Invitation to attend the annual Advisors Forum, a conference that brings impact advisors together to strategize the growth of the impact investing field, best practices in advising philanthropic clients and professional networking.
- One-hour consultation with Confluence staff and ongoing referrals within the network.
- Access to member programming, including monthly webinars and quarterly regional events.
- Opportunity to join a member-driven working group.
- Opportunity to shape programming by submitting content ideas and serving as a thought leader, when invited.
- 24/7 Access to Confluence’s Member Library and listservs.

In addition, Practitioner Advisor Members receive the following:

- Invitation to the Annual Practitioners Gathering. Membership includes one complimentary registration and sponsorship opportunities.
- Additional opportunities to share your work with our network through speaking invitations and by contributing content to our programming.
- Additional opportunities to shape programming and serve as a network leader by serving on event planning committees.

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“I want to put a ding in the universe.”

- Steve Jobs
JOIN THE LEADERSHIP OF CONFLUENCE PHILANTHROPY!

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? 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 Asset Owners only
- 2019 Conference Committee – Open to Asset Owners only until thematic content is selected
- Membership Committee – Open to Advisors and Asset Owners
- Finance and Fundraising Committee – Open to Advisors and Asset Owners

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 Confluence continues to build the field of mission-related investing and produces 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.

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. To learn more about joining the Conference Committee contact Brandy Davis, Investor Program Director.

Membership Committee
The Membership Committee advises the Confluence Board of Directors in outreach, cultivation, and review of membership applications from un-endowed foundations, individual donors, and applicants to the Advisor Membership programs. The Committee meets seasonally by phone as a group and collaborates strategically with Confluence’s CEO throughout the year. Asset Owners and Advisors who are members in good standing are eligible to serve on the committee. To learn more about joining the Membership Committee contact Hannah Erickson, Advisor Program Manager.

Finance and 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. To learn more about joining the Finance Committee contact Dana Lanza, CEO.
WELCOME INTENSIVE: AN INTRODUCTION TO IMPACT INVESTING
2018 LEARNERS INSTITUTE
MONDAY, MARCH 12
SPECIAL PRE-CONFERENCE EVENT

The Welcome Intensive is an introduction to the concepts of mission related investing in an expert-led, small group setting. This program is 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.

This half-day training will be led by Patricia Farrar-Rivas, CEO, Veris Wealth Partners and Jeff Scheer, Director, Pathstone Federal Street. This year, Tom Sargent joins us the peer investor expert. The facilitators will lead an afternoon discussion-group about fiduciary duty, engaging investment advisors, and other topics critical to new mission related investors. The Welcome Intensive will conclude with a special dinner hosted by the facilitators and Confluence staff.

Participants in the Welcome Intensive are also encouraged to attend the Learners Institute on Tuesday, March 13th.

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

Speakers:
- Patricia Farrar-Rivas, CEO, Veris Wealth Partners
- Jeff Scheer, Director, Pathstone Federal Street
- Tom Sargent, Founding Board Member: New Field Foundation, Tamalpais Trust, Kalliopeia Foundation

“The secret of change is to focus all of your energy, not on fighting the old, but on building the new.”
- Socrates
MONDAY, MARCH 12

1:00 PM – Bayview
Welcome Address

1:15 PM – Bayview
Group Introductions

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 – Bayview
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 right for them.

2:30 PM – Bayview
How Can You Reflect Your Values Through Investing?

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. 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.

3:00 PM
Break

3:15 PM – Bayview
Crafting Your Own Approach

Reflecting upon a variety of impact investing tools and strategies, participants will work together to craft a theory of change for a foundation. Groups will design their own impact mission, investments approaches and tactics. Once designed, groups will discuss their fiduciary responsibilities and their role as Trustees.

4:00 PM – Bayview
Tales From the Field

This year we are joined by Tom Sargent, a seasoned impact investor and pioneer in the field. He will share his experiences as a values-based investor, highlighting key takeaways as well as steps (and missteps) taken throughout his personal journey.

5:00 – 6:30 PM
Break

5:30 - 8:30 PM – Angel
Confluence Partner Event: Invest Well, Live Well: The Buen Vivir Fund Launch

Hosted by Thousand Currents

Come celebrate the Buen Vivir Fund’s first round of grassroots investments with us and learn about our design process, launch, and innovations!

6:30 – 8:30 PM
Welcome Intensive Dinner
(open to the Welcome Intensive cohort – by invitation only)
Skates by the Bay (a short walk from the Hotel)

6:00 - 9:00 PM
Gratitude Dinner (by invitation only)
Agave Restaurant at The Kapor Center, Downtown Oakland

CONFERENCE ROAD MAP

Follow Your Thematic Interest Areas

Social Equity Track
Active Owners Track
Climate Track
TUESDAY, MARCH 13

7:30 - 8:30 AM – Islands Ballroom Foyer
Breakfast & Registration

8:00 - 8:30 AM – Amador
Morning Meditation with Konda Mason

2018 PRACTITIONER INSTITUTE
Open to Confluence Practitioner Members Only

Workers and the Future of Work – Bayview

The nature of work is quickly evolving due to advances in technology and shifts in social priorities. What are the opportunities for investors to meaningfully impact workforce training, job quality, and workers’ equality across the supply chain? How will artificial intelligence and data platforms change our assessments and planning decisions about environmental management? Ultimately, where does a growing workforce fit into a rapidly developing, technologically-driven world? Join our panel of innovative thinkers and industry experts in conversation about how investors and grantmakers can affect the Future of Work.

8:45 – 9:00 AM – Bayview
Welcome Remarks by Morgan Simon, Managing Director, Candide Group and Dana Lanza, CEO, Confluence Philanthropy

9:00 – 9:45 AM – Bayview
Keynote
Ai-jen Poo, Director of the National Domestic Workers Alliance, Ford Foundation Trustee, and MacArthur Prize Winner.

Ai-jen Poo is the Director of the National Domestic Workers Alliance and the Co-director of the Caring Across Generations Campaign. She has been organizing immigrant women workers for over two decades, forging pathways to sustainable, quality jobs for the caregiving workforce and ensuring access to affordable child care and elder care for all working families. Ai-jen is a 2014 MacArthur Fellow and is listed on Fortune.com’s 50 World’s greatest Leaders. Ai-jen also serves as a Trustee to The Ford Foundation. She is the author of The Age of Dignity: Preparing for the Elder Boom in a Changing America.

9:45 – 10:45 AM – Bayview
The Future of AI and Work
Whether we realize it or not, artificial intelligence is already a part of our daily lives through the growing use of smart technologies. Make no mistake, AI is already colonizing communities across the Earth. Over the next few years our partnerships with artificial intelligence will become more and more apparent. We will increasingly find ourselves consulting and communicating with data platforms to tap aggregating networks, enhance planning, and inform critical decisions. In this session we will explore how AI will be used across a variety of investment themes to change the ways that all types of workers work.

Speakers:
• Kate Starr, Chief Investment Officer, Flat World Partners (moderator)
• Arjan Schütte, Founder and Managing Partner, Core Innovation Capital
• Additional Speaker to be Announced

10:45 – 11:00 AM
Break

11:00 AM – 12:00 PM – Bayview
Investing in an Equitable Workforce

The typical career trajectory has already changed from a lifetime under one or two employers, to shorter-term or temporary work, or to independence through the gig economy. Changes in corporate employment practices, a deficit in skill or meaningful employment, and attitudinal changes are prevailing factors that determine the ways individuals access work. In this session we will explore a variety of solution-based investor approaches that are promoting quality jobs across the supply chain, fostering workplace transparency, and enhancing the meaning of work.

Speakers:
• Carmen Rojas, CEO, The Workers Lab (moderator)
• Victoria Fram, Managing Director, VilCap Investments, Village Capital
• Jamie Merisotis, CEO, Lumina Foundation
• Alison Omens, Managing Director, Programs and Strategic Engagement, JUST Capital
• Chemain Sanan, Partner, Humanity United
2018 LEARNERS INSTITUTE
Open to All Pre-Conference Attendees

9:00AM – Mariposa
Moving Your Family Foundation Forward: From Consensus to Implementation

Family foundations are a critical part of the philanthropic ecosystem and have growing interest in mission related investing. Join us for a conversation about how members of family foundations engage key stakeholders and navigate the investing journey from initial interest to implementation. Join us to learn from the experience of 3 family foundation fiduciaries who are in various stages of activating their portfolio for impact.

Organized with Rockefeller Philanthropy Advisors

Speakers
• Patrick Briaud, Philanthropic Advisor, Rockefeller Philanthropy Advisors (moderator)
• Meredith Heimburger, Board Member & Finance Committee Member, Cynthia and George Mitchell Foundation
• Jennifer Kenning, Co-Founder and CEO, Align Impact
• Rebekah Saul Butler, Co-Executive Director, Grove Foundation
• Diana Trump, Trustee, Penney Family Fund and Confluence Philanthropy Board of Directors

10:00 AM
Concurrent Sessions (Choose One)

Climate Risk 101 – 201 – El Dorado

Organized with Mercer

Investing in the rapidly advancing clean energy economy is not always as simple as it sounds. Growing numbers of investors are taking capital out of fossil fuels and carbon intensive assets and are looking for opportunities to invest in climate solutions. Along the way some foundations and family offices have found themselves stuck and unable to move forward. Others have made progress and wish to do more. This session will seek to empower those at the beginning of their climate investing journey to understand climate risk, learn the tools to engage their peers and investment partners, and craft a strategy to break through barriers and accelerate investment.

Speakers:
• Jameela Pedicini, Executive Director, Asset Management, Perella Weinberg Partners and OCIO to The Rockefeller Brothers Fund (moderator)
• Alex Bernhardt, US Responsible Investment (RI) Leader, Mercer
• Mark Campanale, Founder & Executive Director, Carbon Tracker Initiative
• John Goldstein, Managing Director, Goldman Sachs

Transforming Investment Practice – Amador
Organized with Athena Capital Advisors

Experimentation with mission related investing has evolved to the point where a variety of approaches have emerged. Some investors are pushing to align their entire portfolios with their values and/or social change objectives. Others are feathering compelling impact opportunities, where feasible, into otherwise conventional investment portfolios. Still others have embraced the ‘carve-out’ approach, and use a separate portfolio for mission related investments to pursue a more focused impact strategy. What are the advantages and disadvantages of these approaches? Which approaches hold the most promise for accelerating the pace of change within a social change agenda?

Speakers:
• Kate Huntington, Managing Director, Athena Capital (moderator)
• Timothy Freundlich, President, Impact Assets
• Paul Solli, Chief Marketing and Strategy Officer, Aperio Group
• Julia Sze, Founder, Julia Sze Consulting

11:00 AM
Concurrent Sessions (Choose One)

Unleash Your Portfolio Through 100% Portfolio Activation – Mariposa

Organized with Athena Capital Advisors

Full portfolio activation is a realistic and increasingly popular goal for mission related investors. In this session we will hear from leading industry managers about how they put the full weight of their clients’ assets to work for impact across asset classes. They will share conceptual frameworks, as well as their comparative and contrasting views around approaches. This promises to be a lively, informative, and inspiring session for those eager to hear about how far they can go with impact.
Speakers:
• Allison Duncan, Founder and CEO, Amplifier Strategies (moderator)
• Jed Emerson, Chief Impact Strategist, Impact Assets
• Erika Karp, Founder and CEO, Cornerstone Capital Group

Collaborating with CDFIs: A Win-Win Solution for Local Investing – AMADOR

Social Equity Track

Organized with New Hampshire Community Loan Fund and CEI

As the mission related investing movement has grown, so has the excitement about investing with a place-based perspective. By nature, Community Development Financial Institutions (CDFIs) can be the most effective intermediaries for private investment and related development services to underserved populations in economically distressed areas reaching people for whom the economy is not working. This session will provide an overview of the genesis and purpose of CDFIs and case studies from both the borrower and investor’s perspectives.

Speakers:
• Keith Bisson, President, Coastal Enterprises Inc (moderator)
• Michael Barber, Executive Director, Alaska Conservation Foundation
• John Hamilton, Vice President of Economic Opportunity, New Hampshire Community Loan Fund
• Purvi Patel, Special Projects Manager, Executive Staff, Self-Help Federal Credit Union

FIELD TRIPS & OFF-SITE SESSIONS
12:15 - 4PM
Pre-registered Attendees Only

12:15 PM – Meet in the Hotel Lobby
Board Buses for Field Trips
12:15 - 4:00 PM
Field Trips

Disrupting Displacement: Affordable Housing in the Bay Area

Social Equity Track
Organized by The Caprock Group and San Francisco Foundation

Steeply rising housing costs in the Bay Area are putting historic pressure on low-income residents to relocate from their communities. More than 60% of low-income households in the region are experiencing or at risk of displacement. How can impact investors promote development without displacement? Join us for an interactive affordable housing tour and learn how both non-profit and for-profit housing developers are using blended capital models to develop housing for low-income residents. The tour will include stops at three innovative affordable housing projects in Oakland – Tassafaronga Village, California Hotel and Fruitvale Village.

Speakers:
• Welcome by Amalgamated Bank
• Nick Flores, Director of Impact Investing, The CAPROCK Group
• Zach McRae, Program Associate, The San Francisco Foundation
• Erin Patch, Chief Operating Officer, The Unity Council
• Isela Rosales, CAIA, Managing Director, Bridge Investment Group
• East Bay Asian Local Development Corporation (Speaker TBA)
• Ener Chiu, Associate Director of Real Estate Development, East Bay Asian Local Development Corporation

Field Trip: Exploring Oakland’s Cultural Hubs: Art, Tech and Entrepreneurship

Social Equity Track
Organized with Kapor Center for Social Impact and Beneficial State Foundation

“If one is lucky, a solitary fantasy can totally transform one million realities.”
- Maya Angelou
Join us for a walking tour of downtown Oakland and explore the city’s vibrant cultural scene. Tour dynamic community hubs that are driving social change in the region. Learn about how local leaders are promoting an equitable tech ecosystem, see social entrepreneurship at work and experience Oakland’s flourishing art scene. Stops on this engaging walking tour include Kapor Center for Social Impact, Impact Hub Oakland, Oakstop and Beneficial State Foundation.

**Speakers:**
- Cedric Brown, Chief of Community Engagement, Kapor Center for Social Impact
- David Jackson, Interim CEO, Impact Hub Oakland
- Trevor Parham, Founder and Director, Oakstop
- Kat Taylor, Co-Founder and Co-CEO, Beneficial State Bank

**Clean Energy Bike Tour**

**Organized with California Clean Energy Fund (CalCEF)**

Danny Kennedy will lead a group exploration of Oakland to visit the convergence of mobility and electricity services globally, which are being disrupted by low cost renewables and new business models. Featuring a ride on Go Bikes, the tour will include stops at the CALCEF Offices, Powerhouse, and Get in And Go Car Share, concluding with a reception at Mosaic to hear CEO Billy Parish share his views on the next phase of renewable energy innovation. The group will stop at Blue Bottle coffee in Jack London Square to refuel along the way.

**Speakers:**
- Welcome by Trillium Asset Management
- Danny Kennedy, Managing Director, California Clean Energy Fund (CalCEF) and Confluence Board of Directors
- Emily Kirsch, Founder & CEO, Powerhouse
- Billy Parish, CEO, Mosaic
- The GIG car, GIG Car Share

**State of Emergency: Addressing the Homelessness Crisis in Oakland**

**Organized with California Wellness Foundation and The California Endowment**

In major cities across the country the homelessness population is on the rise, leading local governments to declare states of emergency. The problem is especially acute in West Coast cities with booming regional economies and surges in the number of people living on the streets. Cities like Oakland, where the homeless population has jumped 25% in two years, are strategizing how to humanely solve the homelessness crisis. Join us for a discussion about investing in the built environment as a place-based solution to ending homelessness, with a focus on transitional age foster youth and formerly incarcerated people. The tour will take participants to visit leading homelessness advocates, an innovative architecture and real estate development firm, and a local black church with plans to use their land to address the crisis.

**Speakers:**
- Welcome by Pegasus Capital Advisors
- Sonja Fitz, Director of Development and Marketing, Building Opportunities for Self Sufficiency
- Kyle Rawlins, Co-Founder and Development Director, Designing Justice + Designing Spaces
- Pastors Maria and Brandon Reems, Center of Hope Community Church
- Deanna Van Buren, Founder and Design Director, Designing Justice + Designing Spaces

**East Bay Tech Innovation Tour**

**Organized with DBL Partners, California Clean Energy Fund (CalCEF), and Ecosystem Integrity Fund**

Join us to explore cleantech growth and innovation in the East Bay. Participants will head up the hill to Lawrence Berkeley National Labs (LBNL) to see the latest thinking and research in cleantech, including a look at LBNL’s FlexLab, the first facility in the world that can evaluate the energy efficiency of major building systems under real-world conditions. We will then take a trip to Richmond, a burgeoning innovation hub, for a reception at SunPower, featuring a tour of their historic building on the waterfront, an anchor of the Richmond innovation community.

**Speakers:**
- Welcome by Cornerstone Capital
- Geoffrey Eisenberg, Principal, The Ecosystem Integrity Fund and Climate Solutions Collaborative Steering Committee Member
- Lisa Hagerman, Director of Programs, DBL Partners
- Tom Starrs, Vice President, Market Strategy and Policy, SunPower
- Alicia Yeh, Executive Director for Biosciences, Berkeley Lab Foundation
MAIN CONFERENCE BEGINS
TUESDAY, MARCH 13

6:00 – 7:00 PM – On The Lawn
Welcome Reception
Registered Attendees Only Please

7:00 – 9:30 PM – Islands Ballroom
Welcome Dinner
Welcome by Lisa Renstrom, Trustee, Bonwood Foundation and Board Chair, Confluence Philanthropy

WEDNESDAY, MARCH 14

7:30 – 8:30 AM – Islands Ballroom & Foyer
Breakfast & Registration

7:45 – 8:15 AM – Amador
Morning Meditation with Konda Mason

7:30 – 8:30 AM – Bayview
Active Owners Working Group Breakfast: Shaping The Digital Future

Active Owners Track

Join us for a critical discussion about how investors can promote greater corporate accountability through shareholder engagement. This special breakfast is organized by the Active Owners Working Group, which promotes strategies for mission related investors and managers to increase transparency and accountability in our economic system. The session will focus on engagement with corporations in the tech sector, who are shaping our digital future.

Speakers
• Allison Barlow, Program Director, Democracy and Media, Wallace Global Fund (moderator)
• Hannah Erickson, Advisor Program Manager, Confluence Philanthropy
• Michael Connor, Executive Director, Open MIC

8:30 – 8:45 AM – Islands Ballroom
Welcome
Danny Kennedy, Managing Director, California Clean Energy Fund (CalCEF) and Confluence Board of Directors

8:45 – 9:15 AM – Islands Ballroom
Keynote
President pro Tempore of the California State Senate, Kevin de León*

As President pro Tempore of the California Senate, Kevin de León (D-Los Angeles) has led the 40-member Senate body to historic accomplishments that will improve the lives of Californians, the state’s environment and economy for decades to come. His legislation has created the most ambitious renewable energy goals in the nation, the first-of-its-kind retirement-savings program for low-income workers, and has required a quarter of all cap-and-trade revenue be spent in disadvantage communities.

9:15 - 10:15 AM – Islands Ballroom
Plenary
Eco-Technology and Disruption: Considerations for Impact Investors

This plenary will highlight the opportunities - and threats - that technology offers as a disruptive force to our collective future. How can mission investors better understand what’s at stake and think more deeply about aligning their values with issues such as synthetic biology, geoengineering, and AI to address climate change? How do mission investors capitalize on these rapid changes, while driving them forward in ethical ways?

Speakers
• Catherine Chen, Managing Director and Financial Advisor, RBC Wealth Management and Confluence Membership Committee Member (moderator)
• Rob Bernard, Chief Environmental Strategist, Microsoft
• Mark Bünger, VP of Research, Lux Research on Synthetic Biology
• Simon Nicholson, Director, Global Environmental Politics Program, American University
• Alison Carlson, Founder and President, Forsythia Foundation

*Confluence Philanthropy does not endorse Senator de Leon in the upcoming election, and invites him solely in his capacity as an advocate for social and environmental issues.
AGENDA

10:15 - 10:30 AM
Break

10:30 - 11:30 AM – Islands Ballroom
Plenary

Driving the Future: Shaping Society by Investing in Technology

Technology has transformed our daily lives, but can the tech industry help us reimagine our environment and solve some of our biggest social problems? Impact investors are reinventing what it means to invest in technology with a focus on social impact – from autonomous vehicles to the shared economy – with great challenge and success. Join us for a dynamic conversation featuring Lyft and their early investors in mission-driven technology.

Speakers
- Ira Ehrenpreis, Managing Partner, DBL Partners (moderator)
- Mike Masserman, Head of Global Policy & Strategy, Lyft
- Tabreez Verjee, Co-Founder, Uprising

11:30 AM – 12:00 PM – Islands Ballroom
Community Reflections

Join us to learn from and appreciate Confluence Members’ reflections on the field in an open forum sharing session.

Facilitated by:
- David Estrada, Partnership Strategy Director, Confluence Philanthropy
- Dana Lanza, CEO, Confluence Philanthropy

12:15 – Mariposa
Reproductive Rights Luncheon

Organized with The Educational Foundation of America

The battle for access to reproductive healthcare at the state and federal level has been raging for decades in the United States. Today, we find ourselves teetering on the edge of a shameful past – at risk of slipping backwards to a time when women and girls were denied access to birth control and abortion. What, if anything, can investors do? The answer is simple: they can unleash the power of shareholder engagement and corporate accountability to ensure that companies provide (or continue to provide) a full range of reproductive healthcare coverage in their insurance plans, and they can galvanize the voice of the marketplace to speak out publicly for rights, equity and healthcare. In this vibrant lunchtime session, we will discuss strategies that have been employed to date, how nonprofits are engaging corporate America in the fight for access to reproductive healthcare, and how investors can roll up their sleeves and get involved in the work.

Speakers
- Melissa Beck, Executive Director, The Educational Foundation of America and Confluence Active Owners Steering Committee Member (moderator)
- Sarah Milne, Vice President, Advancement, As You Sow
- Scott Ruskay-Kidd, Senior Staff Attorney, Judicial Strategy, Center for Reproductive Rights

12:15 – Amador
Foundation Investments in Native America Luncheon

Join us for a conversation about philanthropic investments in Native American communities. Panelists will discuss the challenges and opportunities to increasing access to capital for community development and social enterprise. Participants will also learn about current initiatives, including the Rainmakers Investment Collaborative and Wallace Global Fund’s investment in the Standing Rock Sioux Tribe.

Speakers
- Dave Castillo, CEO, Native Capital Access (moderator)
- Brandy Davis, Investor Program Director, Confluence Philanthropy
- Daryn Dodson, Managing Partner, Illumen Capital
- Stanley Keasling, CEO, Rural Community Assistance Corporation
- Joohee Rand, VP, Community Investment and Strategy, Santa Fe Community Foundation and Confluence Rainmakers Steering Committee Member
Concurrent Sessions (Choose One)

**Integrated Capital and Gender Lens Investing – Angel**

*Social Equity Track*
Organized with Nia Community Foundation and RSF Social Finance

Can impact investing and gender-lens philanthropy improve the health, education, economic empowerment, safety and rights of women and girls? Women are at the center of important movements and trends shaping the future of capital markets. Yet, these trends may not be realized without an intentional and coordinated approach to increasing women’s participation and leadership in impact investing. From training young women investors and donors, to a focus on diversity and inclusion, we will shed light on impact beyond products or services to impacting larger systems and communities. The audience will get a real sense of how to incorporate a systems-thinking lens to help create a more inclusive economy through investments that have multiplier effects.

**Speakers**
- Deb Nelson, Vice President of Client and Community Engagement, RSF Social Finance (moderator)
- Kristin Hull, Founder, Nia Community Foundation
- Ruth Shaber, M.D., Founder & President, Tara Health Foundation
- Tracy Gray, Founder and Managing Partner, The 22 Fund

**Evaluating Social Impact – Mariposa**

*Organized with Linked Foundation and Sonen Capital*

Funders, investors and asset managers are increasingly interested in, and obligated to, demonstrate the complete impact of their investments, including social and environmental performance alongside traditional financial reporting. While demonstrating financial returns is relatively straightforward, quantifying social returns is often not so clear. In this session we will take a practical look at specific, actual strategies that participating funders and asset managers are using, from frameworks based on the UN Sustainable Development Goals and IRIS outputs; to organization-specific strategies that combine outputs with outcomes to measure social impact; to science-based climate change benchmarks to evaluate portfolio climate performance. We will discuss the strengths and weaknesses of these frameworks and the information we are able to communicate to our stakeholders as a result.

**Speakers**
- Anna De La Cruz, Senior Advisor, Linked Foundation (moderator)
- Will Morgan, Head of Impact, Sonen Capital
- Katherine St. Onge, Investor Relations Senior Officer, Calvert Impact Capital
- Amrita VK Vatsal, Managing Director, Business Development, Ecotrust Forest Management

**Waste is the Next Gold Rush: Impact Investing & The Circular Economy – El Dorado**

*Climate Track*
Organized with Hull Family Foundation and Closed Loop Partners

This session will explore the role of investors in growing the circular economy, across industries, sectors, and waste streams. What is a circular economy? Looking beyond the current “take, make and dispose” extractive industrial model, the circular economy is restorative and regenerative by design. Relying on system-wide innovation, it aims to redefine products and services to design waste out, while minimizing negative impacts. Underpinned by a transition to renewable energy sources, the circular model builds economic, natural and social capital. Case studies include timely & relevant examples from companies & visionaries leading the space in sustainable apparel; compostable packaging + mycelium technology; tire waste, upcycling, & ethical footwear; investing in municipalities’ recycling capacity to minimize both material and capital losses.

**Speakers**
- Eric Stephenson, Portfolio Director, Cordes Foundation (moderator)
- Courtney Hull, Trustee, Hull Family Foundation
- Stacy Flynn, CEO, Evrnu
- Douwe Jan Joustra, Head Circular Transformation, C&A Foundation
- Ellen Martin, VP of Impact and Reporting, Closed Loop Partners
Investing in Disaster Recovery – Amador

**Climate Track**
Organized with Cambridge Associates and Community Capital Management

Recent fires in California, nearly 9,000 in 2017 alone, destroyed 1.2 million acres of land. The following rains in Southern California caused mudslides that have claimed at least 21 lives. In other parts of the world, hurricanes and drought have exposed how fragile our infrastructure is to withstanding catastrophic weather events that are becoming all too common in a changing climate. In the context of growing need and frequency, it is important for impact investors to understand how they can deploy capital for immediate impact. Join us to explore actionable ways that you can mobilize your institution to invest in a more resilient system.

**Speakers**
- Margot Brandenburg, Founder, My Strong Home (moderator)
- Elizabeth Brown, President and CEO, Community Foundation Sonoma County
- Zach Knight, Co-Founder and Managing Partner, Blue Forest Conservation
- David Sand, Chief Investment Strategist, Community Capital Management

Maintaining Inclusive Growth in Urban Economic Development – Treasure Island

**Social Equity Track**
Organized with Pegasus Capital Advisors

This session will explore best practices in urban design and development to ensure inclusive economic growth. In particular, it will focus on revitalization of existing distressed urban areas, while avoiding the negative impacts of typical gentrification. We will explore key elements of inclusive economic growth including: best practices in community engagement; creating opportunities for the underserved; creating and maintaining wealth within the community; sustainable building and infrastructure design; and affordable housing. Case studies will be presented that demonstrate both lessons learned and success stories. Metrics and approaches to monitor and evaluate investments in inclusive economic growth will also be discussed.

**Speakers**
- Delilah Rothenberg, Operating Advisor, ESG & Impact, Pegasus Capital Advisors, L.P. (moderator)
- Stephanie Gidigbi, SPARCC Policy, Capacity, and Systems Change Direct & Senior Advisor, Urban Solutions, Natural Resources Defense Council (NRDC)
- Naomi Williams, Director of Impact, Renaissance Downtowns
- Francesca Vietor, Senior Advisor, Donor and Development Services, The San Francisco Foundation

Tales from the Fire: Food Systems – Yerba Buena Island

**Organized with Woodcock Foundation**

There is growing interest among impact investors in promoting sustainable food systems. What are the opportunities and challenges for investors in this space? This year’s Tales from the Fire session features experienced leaders and investors in sustainable food systems who will share lessons learned and discuss opportunities to create measurable social and environmental impact. Panelists will explore the multiple layers of capital that can work together to advance our food system as well as the barriers that prevent more investors from entering the space, despite growing interest. Using a case study approach, panelists will address the particular challenges for small-to-medium sized foundations seeking to invest in food systems. As the public demand for sustainably produced products grows, panelists will discuss how impact investors can play a role in the reform of our food system.

**Speakers**
- Bridget Dobrowski, Program & Operations Director, Sustainable Agriculture & Food Systems Funders (moderator)
- Stacey Faella, Executive Director, The Woodcock Foundation
- Oran B. Hesterman, Ph.D, President & Chief Executive Officer, Fair Food Network
- Jeff Rosen, CFO, Solidago Foundation, and Confluence Vice Chair, Board of Directors
- Beatrice Stern, President, Ralph E Ogden Foundation
2:45 – 5:15 PM  
**Free Time** (optional events below)

### WEDNESDAY SPECIAL EVENTS

#### 3:00 - 4:00 PM – Patio  
**Book Fair and Book Signing**

Join us for refreshments, pick up a book, and have it autographed by thought-leading authors from the Confluence community.

**Speakers**
- Joel Solomon, Author, *The Clean Money Revolution: Reinventing Power, Purpose, and Capitalism*

#### 3:00 - 5:00 PM – Patio  
**Afternoon Fiesta!!**

**Latin America: The Untapped Opportunity for Impact Investing** – Bayview

*Social Equity Track Climate Track*

Hosted by Sonen Capital and Fondo de Fondos

With a young population, growing middle class and robust forecasted capital markets growth, Latin America is a compelling investment opportunity. To ensure continued economic development, social progress, and environmental sustainability, this opportunity is highly aligned with impact investors, who may be active in emerging markets, but less so in the Latin America. Join for a discussion with regional stakeholders to explore the opportunities and obstacles for attracting capital, explore key sectors and potential impact outcomes.

We will then get the “Fiesta” started with hosted drinks to continue individual conversations prior to heading to Yerba Buena Center for the Arts for the evening program.

**Speakers**
- Raúl Pomares, Founder & Managing Director, Sonen Capital (moderator)
- Julián Farah, Corporate Treasury Asset Management, Grupo Bimbo
- Carlos Michel, Principal & Vice President, Fondo de Fondos
- Lorenzo J. de Rosenzweig Pasquel, Executive Director, Fondo

#### 3:00 – 4:30 PM – Meet in the Hotel Lobby  
**Bird Spotting Tour**

Join Bruce Mast of the Audubon Society for an easy 2-mile exploration of adjacent Caesar Chavez Park for bird spotting and tremendous views of the Bay including both the Golden Gate and newly restored Bay Bridge. Bring your cameras as you won’t want to hesitate to snap a few shots!

4:00 PM  
**Early Bus Departure for YBCA**

4:30 - 6:00 PM  
**Arts & Culture: A Path to Shared Prosperity**

A special session at Yerba Buena Center for the Arts. Space limited during pre conference registration.

Join us for a small gathering of investors and philanthropists at Yerba Buena Center for the Arts (YBCA) to explore how investing in artist entrepreneurs and their enterprises is a critical element of long term social, environmental and economic justice. Recognizing that culture precedes change, and that a new system of investment must also consider the development of assets of all kinds within communities, we will explore and surface some of the promising and disruptive investment concepts in play today. The session will include a tour of YBCA’s campus in the heart of San Francisco’s cultural district, and feature CultureBank, a big idea that incubated at YBCA and built with a series of collaborations.

**Speakers**
- Deborah Cullinan, CEO, Yerba Buena Center for the Arts
- Penelope Douglas, Founding Partner, CultureBank
AGENDA

SOCIAL EQUITY
COMMUNITIES
SUSTAINABILITY
DEMOCRACY

Speakers
- Jeff Chang, Executive Director, Institute for Diversity in the Arts and Noted Author (moderator)
- W. Kamau Bell, Comedian, Host: United Shades of America with W. Kamau Bell
- Deborah Cullinan, CEO, Yerba Buena Center for the Arts
- Steve Oliver, President, Oliver & Company
- Closing remarks by Rev. Lennox Yearwood, Jr., President and CEO, Hip Hop Caucus

7:30 – 9:30 PM
Strolling Dinner and Disruptive Fashion Party (and Contest!)

Show off your favorite brand or create your own look. Come dressed in a “disruptive” style and meet those interested in the forefront of sustainable fashion. Prizes will be awarded for the most inspiring fashions and interesting brands. Visit www.confluencegathering.org/disruptive-fashion-party for contest details!

9:30 – 10:00 PM
Board Buses and Return to Berkeley Marina Hotel

“Technology is cool, but you’ve got to use it instead of letting it use you.”
- Prince

5:15 PM
Board Buses to Depart for Yerba Buena Center for the Arts

6:00 – 7:30 PM
Evening Keynote

Welcome by Berit Ashla, Vice President, Rockefeller Philanthropy Advisors and former Board Member, Yerba Buena Center for the Arts

W. Kamau Bell, Comedian, Host: United Shades of America with W. Kamau Bell

W. Kamau Bell is a critically acclaimed sociopolitical comedian and host of the Emmy Award winning hit CNN docu-series United Shades of America with W. Kamau Bell. Kamau Right Now also airs live on NPR radio station KALW. The New York Times called Kamau “the most promising new talent in political comedy in many years.”

Evening Plenary: Art, Culture, and Impact

Art and culture are central catalysts for change, able to build community and a sense of place across political and social divides. Art and culture also disrupt social norms, provoking needed public discourse and shining a light on some of our darkest spaces. Where are impact investors in this transformative dynamic, and how can we show up in ways that are truly supportive? This plenary brings together a panel of provocateurs to engage with us around these questions in entertaining and compelling ways.
THURSDAY, MARCH 15

7:30 – 9:00 AM – Islands Ballroom & Foyer
Registration & Breakfast over Ad Hoc Discussions

7:30 – 8:30 AM – Bayview
Climate Solutions Collaborative Steering Committee Breakfast

Climate Track

C2C Steering Committee Members and invited guests are encouraged to join us for a working group report and strategic discussion for the year ahead.

- Mark Allegrini, Climate Solutions Collaborative Program Manager, Confluence Philanthropy
- Dana Lanza, CEO, Confluence Philanthropy

7:45 – 8:15 AM – Amador
Morning Meditation with Konda Mason

9:00 – 9:15 AM – Islands Ballroom
Morning Introduction

Bruce Kahn, Trustee, Robert & Patricia Switzer Foundation, Confluence Philanthropy Board Member

9:15 – 9:45 AM – Islands Ballroom
Keynote

Lisa Mensah, President & CEO, Opportunity Finance Network

As President and CEO of Opportunity Finance Network (OFN), Lisa Afua Serwah Mensah expands sources of capital and provides greater visibility for CDFIs. Under her leadership, OFN helps CDFIs leverage public funding with private investment from mainstream financial institutions, socially responsible investors, and philanthropic partners in distressed communities across America.

9:45 – 11:15 AM – Islands Ballroom
Plenary

Visionary Voices: The Future of Mission Investing

This plenary will articulate a vision for the future of mission related investing, grounded by a group of pioneers in the field. Compelling discussion among leading investors and groundbreaking managers will touch upon scaling the industry; innovating in impact; the perennial debate between concessionary and market rate of returns; and envisioning the future we want. Case studies and examples will be used to exemplify advancements from the field.

Speakers

- Sharon Alpert, President and CEO, Nathan Cummings Foundation (moderator)
- Kesha Cash, Founder and General Partner, Impact America Fund
- Jason Scott, Co-Managing Partner, Encourage Capital and Climate Solutions Collaborative Steering Committee
- Joel Solomon, Chairman and Co-Founder, Renewal Funds
- Roy Swan, Director, Mission Investments, Ford Foundation

11:15 - 11:30
Break

11:30 AM – 12:45 PM
Concurrent Sessions (Choose one)

Investing for Racial Justice – Mariposa

Social Equity Track

Organized with Zevin Asset Management

Racial injustice is a stark reality for too many Americans and financial access is one of the main drivers of this injustice. Often overlooked and un-discussed, portfolio investments by company and fund affect equity-based outcomes. Join us to learn how your investment decisions affect communities of color, and explore practical examples from foundations and impact investors who are investing with an explicitly racial equity lens.

Speakers

- Sonia Kowal, President, Zevin Asset Management (moderator)
- Andrea Dobson, Chief Operating & Financial Officer, Winthrop Rockefeller Foundation
- Erin Harkless, Senior Investment Director, Cambridge Associates
- Thomas Yee, Initiative Officer-LA Thrives, Low-Income Investment Fund (LIIF)
- James Rucker, Founder, Color of Change
Solarcoaster – Angel

Climate Track
Organized with Energy Foundation and Surdna Foundation

Renewable energy as an asset class has seen a significant influx of capital from banks in senior debt positions and from a variety of investors in equity-based solar and wind projects. This results in a challenging environment for investors who are seeking yield. This session will explore mezzanine debt and other forms of innovative financing for renewable energy projects that provide investors with an attractive risk/reward proposition. We will also explore other bankable low carbon technologies while still providing compelling returns. Metrics and approaches to monitor and evaluate investments will also be discussed.

Speakers
- Megan Crocker, Consultant, Energy Foundation (moderator)
- Adam Browning, Executive Director, Vote Solar Initiative
- Dipender Saluja, Partner & Managing Director, Capricorn Investment Group
- Shuaib Siddiqui, Director, Impact Investing, Surdna Foundation

Impact-First Capital: Achieving Deep Impact and Moving Beyond Market-Rate Expectations – Amador

Social Equity Track
Organized with RSF Social Finance and Global Partnerships

While the broader impact investing market continues to grow, most capital deployed under the banner of “impact” still has little ability or willingness to sacrifice financial returns or to take greater risks in exchange for exceptional social performance. This makes it all the more important for truly impact-led investors to take the lead in sectors where return vs. impact trade-offs are the reality. Calling into question the conventional wisdom that demonstrating “market rate” performance is the path to scaling capital in the sector, this panel will explore how an integrated capital approach – the coordinated use of grants, loans, and other forms of strategic investment – creates deep, transformative impact. Using an array of financial tools and case studies, we will discuss how foundations and philanthropic initiatives can deepen their impact with an integrated capital approach.

Speakers
- Alex Haber, Philanthropic Advisor, RSF Social Finance (moderator)
- Rick Beckett, Chief Executive Officer, Global Partnerships
- Deborah Frieze, Co-Founder and Board Chair, Boston Impact Initiative
- Greg Neichin, Director, Ceniarth LLC

Community Asset Building and MRI Performance – Bayview

Social Equity Track
Organized with Swift Foundation

We begin this session with the premise that Mission-related investments are mostly characterized by top-down agency, ownership and control by the capital providers, subjugating the expertise and wisdom of communities. This panel will propose strategic approaches to mission-aligned, community-driven transformation by challenging the divine right of capital and the premise that foundations must try to maximize financial returns. We will suggest that foundations have a duty to mission when they invest, and we will explore how this approach can be economically sound through collaborative decision making and by sharing returns in ways that are proportionate to contribution. The core proposition is to redirect mission-related assets from conventional investment vehicles to mission-aligned asset-building and reinvestment in historically disenfranchised communities such as indigenous and communities of color.

Speakers
- Leslie Christian, Integrated Capital Specialist, NorthStar Asset Management (Moderator)
- Rahwa Ghirmatzion, Director of Programs, PUSH Buffalo
- Regan Pritzker, Board Member, The Libra Foundation
- Doria Robinson, Board Member, Cooperation Richmond

Disruption in Corporate Accountability: Relational Strategies for Investor Impact – El Dorado

Active Owners Track
Organized with Boston Common Asset Management

For decades Responsible Investors use shareholder leverage to influence corporate and industry practices in the U.S. and globally, often in collaboration with NGOs and activists. Yet in this new era these strategies
are threatened by proposals to reform access to the proxy and by a cascade of government reforms. What tools are investors using to maintain access and hold corporations accountable for their impacts? What success have foundations and other investors had with these strategies? Hear from experts in the corporate, foundation and activist worlds about what works to drive constructive change in corporations and industries.

Speakers:
- Lisa Hayles, Vice President, Institutional Investment Services, Boston Common Asset Management (moderator)
- Ivan Frishberg, Vice President, Sustainability Banking, Amalgamated Bank
- Jon Jensen, Executive Director, Park Foundation
- Brianna Murphy, Vice President, Shareholder Advocacy, Trillium Asset Management

Technology and Educational Equity – Yerba Buena Island

Organized with Tiedemann Wealth Management and Avivar Capital

Impact investors are increasingly examining the role of technology in the classroom. In this session, we will discuss what the classroom of tomorrow might look like and how technology crafts that vision. In particular, we will delve into the potential for technology to play a key role within the educational system by contrasting possible positive, or negative, outcomes. Finally, we will explore what the limits to technology. What other interventions are needed that technology cannot provide?

Speakers:
- Shilpa Patel, Director of Mission Investing, ClimateWorks Foundation (moderator)
- Stephanie Cohn-Rupp, Managing Director, Tiedemann Wealth Management (Moderator)
- Tina Castro, CFA, Managing Partner and Co-Founder, Avivar Capital
- Gerald Pambo-Awich, Director-Strategic Initiatives and Impact Investments, Prudential Financial

Impact Investing in Sustainable Land Use – Angel A Luncheon Organized by The MacArthur Foundation

Climate Track

Climate change is one of the greatest and most time-urgent threats facing humanity in the 21st century, and natural climate solutions are one of humanity’s key tools for limiting and stabilizing global warming. Conventional mitigation will not be enough, and negative emissions – where carbon dioxide is removed from the atmosphere as it is with forests – are absolutely necessary. Responsible management of forests and agricultural land, currently the second largest contributor to GHG emissions, is essential for delivering on global climate goals. This luncheon will share how impact investors can play a role in addressing this urgent need, including how open-ended holding company structures are uniquely suited to tackling the challenge of sustainable land use, the nature and scope of the opportunity, and how philanthropic leaders are connecting impact investing and programmatic priorities to focus on this need at scale.

Speakers
- Shilpa Patel, Director of Mission Investing, ClimateWorks Foundation (moderator)
- Dr. Serena Guarnaschelli, Partner, KOIS Invest
- Belinda Morris, Program Officer in Conservation and Science, David and Lucile Packard Foundation
- Susan Phinney Silver, Director of Mission Investing, David and Lucile Packard Foundation

“When something is important enough, you do it even if the odds are not in your favor.”

-Elon Musk
Racial Equity Luncheon – Mariposa

Social Equity Track

To mark the launch of our Racial Equity Initiative, Confluence Board and Staff will lead a critical conversation with philanthropic leaders about diversity, equity and inclusion in the impact investing industry.

Speakers

• Fatima Angeles, Vice President of Programs, The California Wellness Foundation
• Erika Seth Davies, Acting Chief of Staff, Baltimore Community Foundation
• Brandy Davis, Investor Program Director, Confluence Philanthropy
• Shawn Ginwright, Trustee, The California Endowment, and Confluence Board Member
• Sonja Velez, CFO, The San Francisco Foundation

2:00 - 3:00 PM – Islands Ballroom

Membership Meeting (Members-Only)

Join Confluence Philanthropy’s Board to hear about the year ahead, ask questions, and share your ideas. Special announcements about the successes of our programs over the past year, changes in programming, and ways that you can get involved will be made.
POST CONFERENCE EVENTS

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

WORKING GROUPS & MEETINGS

3:00 PM
Working Groups & Meetings - Open to all conference attendees~

The Climate Solutions Collaborative (C2C) Working Group Meeting – Mariposa

Organized by C2C and Biodiversity Funders Group (formerly Climate & Energy Funders)

While the economics clearly point to gathering momentum for the clean energy transition, barriers remain achieving the scale and pace needed to solve climate change. Philanthropic and family office investors must figure out how to overcome institutional hurdles, political barriers and poorly understood risks to achieve maximum environmental and financial impact. Join members of the Climate Solutions Collaborative (C2C) working group to explore next-level strategies for advancing climate solutions through your investment activities. We will hear insights about the latest policy developments in the climate space and explore ways for investors to engage. The group will have deep discussion about how to mobilize and scale investments in climate solutions. Participants are encouraged to share their successes and challenges with the group to facilitate better collaboration and problem solving.

Speakers
• Aimée Christensen, CEO, Christensen Family Foundation and Climate Solutions Collaborative Steering Committee Member (moderator)
• Dana Lanza, CEO, Confluence Philanthropy
• Aimee Barnes, Senior Advisor to the Governor in the Office of Governor Edmund G. Brown Jr.
• David Hochshield, Commissioner, California Energy Commission
• Joseph Sciortino, Executive Director, Schmidt Family Foundation
• Jason Anderson, Director of International Engagement and Non-CO2 Initiatives, ClimateWorks Foundation
• Mata Friedman, Chief Investment Officer and Co-Founder, Generate Capital

Gender Lens Investing Meeting – Amador

Social Equity Track

Please join Suzanne Biegel, Ruth Shaber and others working on gender lens investing to explore next-level strategies for advancing solutions in this arena. Topics will include strategies for public investments, how we are mapping financial systems, as well as discussions about how collaboratives are working to enable collective action in women’s health and other social issue areas. Participants are encouraged to share their successes and challenges with the group to facilitate better collaboration and problem solving.

Led By:
• Suzanne Biegel, Catalyst-at-Large
• Ruth Shaber, M.D., Founder & President, Tara Health Foundation

Investor Alliance for Human Rights Meeting – El Dorado

Active Owners Track Social Equity Track

Hosted by The Interfaith Center on Corporate Responsibility (ICCR)

The Interfaith Center on Corporate Responsibility (ICCR) is convening the Investor Alliance for Human Rights to provide a collective action platform that will consolidate and amplify investor influence on a full spectrum of human rights and labor rights issues. Given the current threats to human rights domestically and globally, coordinated action is urgently needed to continue to press companies—both leaders and laggards—to address human rights risks, and to prevent policy and regulatory rollbacks that would forestall progress on business and human rights. The new network builds on longstanding ICCR member efforts on human rights to expand investor participation, provide more strategic focus, and maximize the collective impact of the investment community on business and human rights issues. This session is for all investors who may be interested in participating with in the Alliance. Investors involved in establishing the network will discuss the goals of the Alliance, and we will hold an open forum for discussion and brainstorming on strategies to leverage the investor voice on key human rights issues.

Led by:
• Josh Zinner, CEO, Interfaith Center on Corporate Responsibility (ICCR)
• Lisa Hayles, Vice President, Institutional Investment Services, Boston Common Asset Management
• Tim Smith, Director of ESG Shareowner Engagement, Walden Asset Management
CONFERENCE KEYNOTE SPEAKERS

Ai-jen Poo
Ai-jen Poo is the Director of the National Domestic Workers Alliance and the Co-director of the Caring Across Generations Campaign. She has been organizing immigrant women workers for over two decades, forging pathways to sustainable, quality jobs for the caregiving workforce and ensuring access to affordable child care and elder care for all working families. Ai-jen is a 2014 MacArthur Fellow and is listed on Fortune.com’s 50 World’s greatest Leaders. She is the author of The Age of Dignity: Preparing for the Elder Boom in a Changing America. Follow her on Twitter at @aijenpoo.

W. Kamau Bell
W. Kamau Bell is a critically acclaimed sociopolitical comedian and host of the Emmy Award winning hit CNN docu-series United Shades of America with W. Kamau Bell. Kamau’s first book, The Awkward Thoughts of W. Kamau Bell: Tales of a 6’ 4”, African American, Heterosexual, Cisgender, Left-Leaning, Asthmatic, Black and Proud Blerd, Mama’s Boy, Dad, and Stand-Up Comedian, was released in 2017. Kamau has hosted three critically acclaimed podcasts: Denzel Washington is The Greatest Actor of All Time Period, Politically Re-Active, and Kamau Right Now! Kamau Right Now also airs live on NPR radio station KALW. Kamau’s first comedy special, Semi-Prominent Negro premiered on Showtime. And the comedy album for the special was released on Kill Rock Stars. The New York Times called Kamau “the most promising new talent in political comedy in many years.”

Kevin de León
As President pro Tempore of the California Senate, Kevin de León (D-Los Angeles) has led the 40-member Senate body to historic accomplishments that will improve the lives of Californians, the state’s environment and economy for decades to come. In his three years leading the Senate, the progress that has been made on critical issues confronting California and the nation stands in stark contrast to the gridlock in the U.S. Congress. Senator de León is the first Latino elected to lead the State Senate in over 130 years. Senator de León is focused on building a more prosperous, equitable, and sustainable economy for the Golden State. His agenda includes: making college more accessible and affordable; combating climate change; building a clean-energy economy; improving retirement security for low-income workers; supporting California’s growing diverse communities; fighting homelessness; and providing protections and opportunities to our immigrant residents. His legislation has created the most ambitious renewable energy goals in the nation, the first-of-its-kind retirement-savings program for low-income workers, and has required a quarter of all cap-and-trade revenue be spent in disadvantage communities. He has an extensive record on women’s and workers’ rights and gun-violence prevention. Senator de León served four years in the Assembly before being elected to the Senate in 2010.

Lisa Mensah
As President and CEO of Opportunity Finance Network (OFN), the nation’s leading network of Community Development Financial Institutions (CDFIs), Lisa Afua Serwah Mensah expands sources of capital and provides greater visibility for CDFIs. Under her leadership, OFN helps CDFIs leverage public funding with private investment from mainstream financial institutions, socially responsible investors, and philanthropic partners in distressed communities across America. In 2014 Mensah was nominated by President Obama and confirmed by the US Senate for the position of Under Secretary of Agriculture for Rural Development. Mensah achieved record levels of productivity and developed new partnerships with private and philanthropic partners to generate $120 million in private grants and loan guarantees for persistently poor rural communities. Before her appointment as Under Secretary, Mensah was the founding Executive Director of the Initiative on Financial Security at The Aspen Institute where she led a national bipartisan effort with leaders of financial institutions, non-profit executives and experts to promote savings, homeownership, and retirement policies and products. Mensah, who divides her time between OFN’s Philadelphia headquarters and Washington D.C. office, holds an M.A. from the Paul H. Nitze School of Advanced International Studies of The Johns Hopkins University and a B.A. from Harvard University.
PROGRAM AREAS AND WORKING GROUPS

In service to our motto, ‘Own What You Own,’ Confluence members create the cutting-edge of impact investing, pushing foundations, family offices, and advisory firms to be better investors. Together we organize more than 20 convenings per year that expand the field.

Active Owners Working Group
The Active Owners Working Group focuses broadly on the role of money in our political system, and how investors and managers can work together to promote governmental and corporate transparency and accountability, as well as fair and equitable representation in the political process. This group uses educational programs, network building, and cross-sector collaboration to raise the level of discourse and action among impact investors interested in using their asset ownership as a tool to support and strengthen our democracy. From established investing strategies such as shareholder resolutions and proxy voting, to emerging issues including campaign finance and corporate disclosure reform, the Active Owners Working Group creates a community of practice for bringing ‘dark money’ in politics into the light.

Climate Solutions Collaborative (C2C)
The Climate Solutions Collaborative (C2C) is a solutions-oriented working group for pioneering philanthropies, investment managers, and family offices in climate investing. As a joint project of Confluence Philanthropy and the CREO Syndicate, network members support one another through collaboration to accelerate the flow of capital to address climate change. Working group members are committed to making investments that measurably reduce emissions and are working together to deploy $3 billion in private and philanthropic capital by 2025. C2C’s overarching objective is bringing market-based climate solutions to scale and to make the field of climate investing more connective, active, and effective.

Rainmakers Investment Collaborative (RIC)
The Rainmakers Investment Collaborative is a coordinated group of impact investors committed to increasing access to capital in Native communities in the Southwest. The launch of RIC in the Spring of 2017 was preceded by a year-long research initiative into the barriers to mission-related investing in tribal communities. RIC investors collaborate to provide community development loans to Native communities in New Mexico and Arizona in the following areas: energy efficient affordable housing, community infrastructure and facilities, sustainable agriculture, and Native-owned social enterprises. In addition to providing vital community development finance, RIC seeks to grow the capacity of Native CDFIs and economic development organizations to lend capital, attract investments and service debt.

Food Systems Working Group (Formerly Mission Fish)
Mission Fish focused on mission-related investments in sustainable fisheries. The working group built an effective community of practice with the goal of promoting alternative finance streams for sustainable fisheries. In response to the growing interest among investors in food security, including sustainable agriculture, Mission Fish was expanded and renamed the Food Systems Working Group in 2018. The steering committee is engaged in a strategic visioning process about the role of impact investors in reforming our food system.

“I have the same goal I’ve had ever since I was girl: I want to rule the world.”
- Madonna
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Veris and Confluence are committed to disrupting the status quo to create a more sustainable world.

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Dream big with us.

Veris Wealth Partners, an impact wealth management firm for individuals, families and foundations seeking financial performance and social gain.

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ACKNOWLEDGMENTS

The Confluence Practitioners Meeting is created through a unique democratic process. Members of the Practitioner Investors Program, along with their investment advisors, propose concepts that are then voted on by the Practitioner Members. The individuals who proposed selected sessions are invited to help plan those sessions. We would like to both congratulate and thank those members who have helped to shape the 8th 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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<td>Deputy Director, Beneficial State Foundation</td>
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<td>Sonia Kowal</td>
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<td>Bill McCalpin</td>
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<td>Zach McRae</td>
<td>Program Associate, San Francisco Foundation</td>
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<tr>
<td>Will Morgan</td>
<td>Head of Impact, Sonen Capital</td>
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<td>Founder &amp; Managing Director, Sonen Capital</td>
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<td>Co-Founder, Development Director, Designing Justice + Designing Spaces</td>
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<td>SPECIAL EVENT ORGANIZERS</td>
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<td>Berit Ashla</td>
<td>Vice President, Rockefeller Philanthropy Advisors</td>
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<td>Vice-Chair, Cordes Foundation</td>
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<td>Stephanie Cordes</td>
<td>Catalyst at Large</td>
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<td>Kristin Hull</td>
<td>Founder, Nia Community Foundation</td>
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<tr>
<td>Lisa Renstrom</td>
<td>Chair of the Board, Confluence Philanthropy</td>
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<tr>
<td>Scott Leonard</td>
<td>Investment Committee Member, C&amp;A Foundation</td>
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<td>BOARD MEMBERS</td>
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<td>Trustee, The California Endowment</td>
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<td>Bruce Kahn</td>
<td>Trustee, The Robert &amp; Patricia Switzer Foundation</td>
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<td>Managing Director, California Clean Energy Fund (CalCEF)</td>
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<td>Dana Lanza</td>
<td>CEO, Confluence Philanthropy (Board Secretary, Ex Officio)</td>
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<td>Lisa Renstrom</td>
<td>Trustee, Bonwood Social Investment (Board Chair)</td>
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<td>Jeff Rosen</td>
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<td>Vice President for Finance and Operations, Rockefeller Brothers Fund (Audit Committee Chair)</td>
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<tr>
<td>CONFLUENCE STAFF</td>
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<tr>
<td>Mark Allegrini</td>
<td>Climate Solutions Program Manager</td>
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<tr>
<td>Brandy Davis</td>
<td>Investor Program Director</td>
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<tr>
<td>Elizabeth Delph</td>
<td>Managing Director</td>
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<tr>
<td>Hannah Erickson</td>
<td>Advisor Program Manager</td>
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<td>David Estrada</td>
<td>Partnership Strategy Director</td>
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<tr>
<td>Elizabeth Gilbert</td>
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<tr>
<td>Dana Lanza</td>
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<td>Rachel Miller</td>
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SPECIAL ACKNOWLEDGEMENTS
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Bonwood Foundation
Tracy Ferron
Scott Leonard
Joshua Mailman
Regan Pritzker
Trillium Asset Management

EVENT PLANNING CONSULTANTS
Jessica de Jesus, On-site Event Manager, Homegrown Events
Linda Smith, Event Management Consultant, Green Meeting

COMMUNITIES
DEMOCRACY
SUSTAINABILITY
SOCIAL EQUITY
"When you light a candle, you also cast a shadow."

– Ursula K. Le Guin, 1929-2018