<table>
<thead>
<tr>
<th>Time</th>
<th>Monday, March 4</th>
<th>Tuesday, March 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM</td>
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<tr>
<td>7:30 – 8:45 AM</td>
<td>Breakfast and Registration</td>
<td>8:00 – 9:00 AM Active Owners Working Group Breakfast</td>
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<tr>
<td>8:00 – 9:00 AM</td>
<td>Breakfast and Registration</td>
<td>8:00 – 9:00 AM Special Breakfast Session: Gender Lens Investing</td>
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<tr>
<td>9:00 AM – 12:00 PM</td>
<td>Practitioners Institute (For Practitioner Members Only)</td>
<td>10:00 – 11:15 AM Plenary</td>
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<tr>
<td>12:00 – 1:00 PM</td>
<td>Field Trips (Pre-Registered Attendees Only)</td>
<td>11:15 – 12:00 PM Community Reflection</td>
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<tr>
<td>1:00 – 5:00 PM</td>
<td>Field Trips (Pre-Registered Attendees Only)</td>
<td>12:00 – 1:15 PM Lunch with Ad Hoc Session</td>
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<tr>
<td>2:00 – 3:00 PM</td>
<td>Field Trips (Pre-Registered Attendees Only)</td>
<td>12:00 – 1:15 PM Special Luncheon: Investing in Native Communities</td>
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<tr>
<td>5:00 – 6:00 PM</td>
<td>Field Trips (Pre-Registered Attendees Only)</td>
<td>3:30 – 4:00 PM Welcome Reception</td>
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<tr>
<td>6:30 – 9:30 PM</td>
<td>Welcome Intensive Dinner (Welcome Intensive Cohort)</td>
<td>4:30 – 6:00 PM Break</td>
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<td>6:00 – 7:00 PM Plenary: Building a True Climate Movement</td>
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<tr>
<td>9:00 PM – 10:00 PM</td>
<td>Welcome Intensive Dinner (Welcome Intensive Cohort)</td>
<td>7:00 – 8:00 PM Networking Gala</td>
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<td>8:00 – 9:30 PM Plenary: Building a True Climate Movement</td>
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Please check signage for location of all events.
JOIN A THEMATIC CONFERENCE TRACK!
LOOK FOR THESE ICONS

CLIMATE SOLUTIONS
The Climate Solutions track aims to amplify the urgency of the climate crisis, while exemplifying real investment solutions. This year’s sessions emphasize collaboration, policy interventions, and adaptation, and will include a special evening event about how we can build an honest, pluralistic movement to address climate change.

DIVERSITY, EQUITY & INCLUSION TRACK
The Diversity, Equity and Inclusion track provides deep discussion, compelling research, and model investments for investing with a commitment to diversity, equity, and inclusion. This year’s program focuses on racial equity, reproductive rights, investing in Native communities, and investing with a gender lens. The field trips showcase examples of affordable housing and arts projects that touch upon the social issues of our time.

GOVERNANCE TRACK
The Governance track explores the planning and execution of investment strategies – from active ownership to underpinning the legalities and decision-making processes for an impact mandate. This year’s sessions provide “how-tos” about selecting an advisor, incorporating C4 strategies, and divestment versus engagement. Join us Wednesday morning for the Annual Active Owners Working Group Breakfast.

INVESTMENT PRACTICE TRACK
The Investment Practice track features discussion at the cutting edge of the investment industry through peer-to-peer sharing among Confluence Practitioners. This year’s sessions look at selecting emerging managers, using Donor Advised Funds for impact investing, going 100% into PRI’s, and the future of banking, among other topics.

CONTACTS

Confluence Philanthropy
General Office: (510) 587-9750
1 Hotel Brooklyn Bridge
(347) 696-2500

STAFF NUMBERS FOR EVENT HOURS
Text or Call
Rick Fowler, Event Coordinator: (202) 321-0302
Brett Metzger, Operations Director: (510) 740-8291

GETTING TO THE HOTEL & CONFERENCE SITE
1 Hotel Brooklyn Bridge - 60 Furman Street, Brooklyn, NY 11201 • (347) 696-2500

Subway
1 Hotel Brooklyn Bridge can be easily accessed by many of the New York City Subways.
A or C Train to High Street (8 minute walk, 0.4 mile)
F Train to York Street (11 minute walk, 0.6 mile)
2 or 3 Train to Clark Street (10 minute walk, 0.5 mile)
R Train to Court Street (15 minute walk, 0.8 mile)
2, 3, 4 or 5 Train to Borough Hall (16 minute walk, 0.8 mile)
Visit MTA.info for more information on the New York City Subway.

Ferry
1 Hotel Brooklyn Bridge is conveniently located next to the DUMBO ferry terminal, providing ease of access from Manhattan.
Take the NYC Ferry Northbound or Southbound to Brooklyn Bridge Park / DUMBO. The fare is $2.75.
From there, the hotel is less than a five-minute walk away.

Parking
Valet parking is available at the following rates:
Up to 3 hours $25.00
Up to 6 hours $35.00
Max to 24 hours $45.00
Oversize/Exotic Additional $10.00
Parking for electric vehicles is complimentary.

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 investors and their advisors to meet and strategize about the best use of assets in fulfilling their financial goals.
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 fundraisers do not solicit attendees unless invited. Those who violate this policy will not be welcome at future meetings. Thank you for your support in protecting the intent of the Practitioners Gathering.

1 Hotel Brooklyn Bridge
60 Furman Street, Brooklyn, NY 11201

WWW.CONFLUENCEPHILANTHROPY.ORG
Brooklyn Heights Social Club
Nestled in a green oasis on the 10th floor, against a backdrop of panoramic views of the Manhattan skyline, Brooklyn Heights Social Club is the perfect escape for a craft cocktail. Live DJs spin custom playlists in this rich yet refined ambiance.

HOURS
5pm – 12am | Monday - Thursday
5pm – 2am | Fridays
2pm – 2am | Saturdays
2pm – 12am | Sundays

The Osprey
Ospreys fly the world over as long as they nest near two things: food and open water. At The Osprey, you’ll find both. Join us for market-driven American comfort food served just steps from the East River and Brooklyn Bridge.

HOURS
Breakfast: Saturday & Sunday | 7am – 10am
Lunch: Monday – Friday | 11am – 3pm
Dinner: Saturday & Sunday | 5:30pm – 10:30pm
Brunch: Saturday & Sunday | 10am – 3pm

POE Yoga
POE Stands for Peace on Earth. POE is the ultimate luxury boutique hot yoga, fire barre, and boxing studio in the metropolitan area, and it has just opened at 1 Hotel Brooklyn Bridge.

1 Hotel Brooklyn Bridge
(347) 696-2500
Welcome to your Brooklyn Bridge waterfront retreat, with expansive views of the East River and the Manhattan skyline. Designed by local artists using native greenery and reclaimed materials, nature is home in Brooklyn. 1 Hotel Brooklyn Bridge is LEED certified.

Neighbors Cafe
From grabbing a fresh pressed juice after a run, to reconnecting with a friend over a freshly cooked meal, locals and hotel guests seamlessly cross paths at Neighbors. With a thoughtfully curated selection of ready-made local, artisanal goods, guests can even bring a little bit of Brooklyn home with them.

HOURS
Open daily | 6am – 7pm
Our full breakfast menu is available Monday through Friday, 7am – 11am.

Field House Fitness Center
Recharge 24/7. The Field House is fully equipped with stationary bicycles, resistance treadmills, kettlebells, and yoga mats. Refresh with filtered water and organic cotton towels.

Bamford Haybarn Spa
Relax in treatment rooms or our private suite as you rejuvenate with a selection of holistic treatments based on a heartfelt connection with nature and using natural restorative ingredients, as well as services and classes meant to nurture the mind, body and spirit. Named Best Facial in Allure Magazine’s April Skincare Directory.

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Lobby Farmstand
At our daily market stand you’ll find fresh fruits, nuts, granola and more. Open to guests and neighbors alike.

HOURS
Open daily | 8am – 6pm
We encourage you to download our conference app, Guidebook, which will give you access to the full conference agenda on-the-go.

TO GET THE APP EITHER...
1. Open up your device’s web browser and visit guidebook.com/getit
2. Scan the QR code to the right with your phone’s QR scanner
3. Search for ‘Guidebook’ in the Apple, Google, or Amazon app stores

Confluence seeks to create a safe space for all attending the Practitioners Gathering. We ask all attendees to use reasoned judgment in what you share externally.
Welcome Intensive will conclude with a special dinner hosted by Veris Wealth Partners and Jeff Scheer, Director, Pathstone Federal Street. The facilitators will lead an afternoon discussion about fiduciary duty, engaging investment advisors, and other topics critical to new mission-related investors. This half-day training will be led by Patricia Farrar-Rivas, CEO, Veris Wealth Partners and Jeff Scheer, Director, Pathstone Federal Street. The facilitators will lead an afternoon discussion about fiduciary duty, engaging investment advisors, and other topics critical to new mission-related investors. The Welcome Intensive provides an introduction to the concepts of mission-related investing in an expert-led, small-group setting. This program is intended 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 Welcome Intensive offers an introduction to mission-related investing through a series of plenary discussions, small-group sessions, and field trips. Participants will have the opportunity to engage with leading experts, network with peers and allies, and explore innovative solutions to address the social and environmental challenges of our time.

Speakers
Patricia Farrar-Rivas, CEO, Veris Wealth Partners
Jeff Scheer, Director, Pathstone Federal Street
Ian Simmons, Co-Founder & Principal, Blue Haven Initiative

ART GALLERY PRIVATE TOUR OF FORD FOUNDATION 3:30 PM
5:00 – 6:00 PM GO TO DINNER
6:00 – 9:00 PM WELCOME INTENSIVE DINNER
Sinigual, 640 3rd Ave
Open to the Welcome Intensive cohort
6:30 – 9:00 PM GRATITUDE DINNER
By invitation only

Monday, March 4
1:00 – 5:00 PM THE WELCOME INTENSIVE: AN INTRODUCTION TO MISSION-RELATED INVESTING
Hosted at The Ford Foundation, 320 East 43rd Street, New York
Organized with Pathstone Federal Street and Veris Wealth Partners
Open to Welcome Intensive Registrants. Please note that this training is not suited for investment professionals.

5:00 – 6:00 PM ART GALLERY PRIVATE TOUR OF FORD FOUNDATION

Tuesday, March 5
7:30 – 8:45 AM PRACTITIONER BREAKFAST & REGISTRATION
Room: Blue Wood Aster

8:50 AM – 12:00 PM PRACTITIONERS INSTITUTE – DIVERSITY, EQUITY, AND INCLUSION
Room: Blue Wood Aster
This year’s Practitioners Institute offers conference attendees deep, candid discussion about how markets have traditionally excluded large swaths of society based on race and/or gender. Openings keynote by Angela Glover Blackwell and Joan Williams will frame the concept of equity from morning’s outset, and we will hear from Confluence Practitioners about best practices and lessons learned for building authentic leadership and pathways to power within their institutions. Open to Confluence Practitioner Member Delegates only. Registration will be checked at the door. Please have your badge handy.

8:50 AM Welcome Remarks by Dana Lanza, CEO, Confluence Philanthropy

9:00 AM Keynote: Angela Glover Blackwell, Founder in Residence, PolicyLink
Angela Glover Blackwell, founded PolicyLink in 1999 to use public policy to improve access and opportunity for all low-income people and communities of color, particularly in the areas of health, housing, transportation, and infrastructure. A lawyer by training, Angela is the co-author of Uncommon Ground: Race and America’s Future and author of “The Curb Cut Effect,” published in the Stanford Social Innovation Review. She is a frequent speaker at major news organizations.

10:45 – 10:55 AM Building Equity Solutions
Facilitated by Dana Lanza, CEO, Confluence Philanthropy

11:45 AM More Than Numbers
The data surrounding the number of women and people of color in positions of influence within the investment industry is disappointing and daunting. Panel participants will dig into how we can better measure what matters, build and empower diverse leadership, and create a movement for real change within philanthropy and the investment industry.

Speakers:
Fatima Angeles, Vice President of Programs, California Wellness Foundation (moderator)
Erika Davies, Racial Equity Consultant, Confluence Philanthropy

12:00 – 12:15 PM Break

12:15 – 1:15 PM Building Equity Solutions Field Trips
Participants will engage in a broad group discussion about strategies that are working and lessons learned to begin to build a more equitable paradigm. Join us to hear from experienced practitioners in the field on best practices and lessons learned for creating change around DEI in their organizations.

Speakers:
Angela Glover Blackwell, Founded in Residence, PolicyLink
Fatima Angeles, California Wellness Foundation (moderator)

12:00 – 12:15 PM MOVE TO FIELD TRIPS

6:30 – 9:00 PM WELCOME INTENSIVE DINNER
Sinigual, 640 3rd Ave
Open to the Welcome Intensive cohort
6:30 – 9:30 PM GRATITUDE DINNER
By invitation only

9:45 AM Plenary Discussion: Diversity, Equity, and Inclusion
The DEI session offers conference attendees a chance for deep discussion and candid conversation around how markets have traditionally excluded large swaths of society based on race and/or gender. We will frame the concept of equity from the plenary’s outset, and we will hear from experienced practitioners in the field on best practices and lessons learned for creating change around DEI in their organizations.

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12:00 – 12:15 PM MOVE TO FIELD TRIPS

**TUESDAY, MARCH 5**

**7:30 - 8:45 AM**
**LEARNER BREAKFAST & REGISTRATION**
Room: Social Space

**9:00 AM - 12:00 PM**
**LEARNERS INSTITUTE**
Room: Social Space and Meadow
Open to all Pre-Conference Participants

**9:00 AM**
**Selecting an Advisor**
Room: Social Space
Organized with the Jessie Smith Noyes Foundation

This session will explore strategies to assess, manage, and collaborate with values-aligned investment advisors. We will hear from foundations with investment priorities, to learn from their experiences and answer the question, "how can the practices and culture of an advisor or fund manager embody the values of mission-driven organizations?" Panelists will share their distinct processes for evaluating investment requirements, identifying potential partners, and collaborating with their chosen advisor. Speakers will also provide resources and practical tips for those looking to improve the ways in which they collaborate with their advisor.

Speakers:
Rini Banerjee, President, Jessie Smith Noyes Foundation (moderator)
Susan Babcock, Consultant, Susan Babcock Consulting
Philip Carey, Trustee, The Sapelo Foundation

**10:00 AM**
**CONCURRENT SESSIONS**
Open to All Pre-Conference Participants

**Ins and Outs of Carve-Outs**
Room: Social Space
Organized with Cornerstone Capital Group

Carve-outs are an increasingly popular way for mission investors to explore new practices. While a gradual, educational, and incremental strategy is often advisable, investors must also consider a methodical approach to ensure that investments provide meaningful outcomes and measurable performance. This session will explore the considerations in choosing a carve-out strategy through the eyes of experience.

Speakers:
Craig Metrick, Managing Director, Cornerstone Capital Group (moderator)
Giulia Christianson, Senior Associate, World Resources Institute
Dan Chu, Executive Director, The Sierra Club Foundation
Rebekah Saul Butler, Co-Executive Director, Grove Foundation

**DAFs: Maximizing the Impact of Donor-Advised Funds**
Room: Social Space
Organized with Tides and Amalgamated Bank

The Donor-Advised Fund (DAF) market is now equivalent in size to the venture capital market. This both offers a great opportunity and raises concerns regarding transparency and impact. This session will cover ways to deepen the environmental, social and governance focus within the DAF market, and suggest provocative and practical examples and models of how this field can evolve. As the DAF market swells to represent a significant portion of the philanthropic landscape, we need to work together to identify and strategize around the associated opportunities and risks.

Speakers:
Anna Fink, Vice President, Amalgamated Bank (moderator)
Amy Bennett, Director Marketing, Impact Assets
Susan Hammel, Founder and CEO, Cogent Consulting
Joohee Rand, VP, Community Investment and Strategy, Santa Fe Community Foundation

**11:00 AM**
**CONCURRENT SESSIONS**
Open to All Pre-Conference Participants

**Divest or Engage: From Fossil Fuels to Gun Stocks**
Room: Meadow
Organized with Trillium Asset Management

When an industry or specific company does not align with an investor’s values, the investor has two options: divest or engage. In this session, we’ll discuss what an investor can achieve through either of these two strategies and why and how some choose to implement both divestment and engagement to drive change.

Speakers:
Matt Patsky, CEO, Trillium Asset Management (moderator)
David Abbott, Executive Director, The George Gund Foundation
Sampriti Ganguli, CEO, Arabella Advisors
Linda Stephens, Managing Director, Graystone Consulting, A business of Morgan Stanley

**Loan Guarantees: Catalytic and Collaborative Uses**
Room: Meadow
Organized with MCE Social Capital

Loan guarantees are an underutilized tool in the investor’s toolkit. Panelists representing both big and small foundations will discuss examples of the catalytic use of loan guarantees to unlock private capital and how they have collaborated with other foundations in a “guarantee pool” to support strong performance outcomes, both domestically and globally.

Speakers:
Catherine Covington, Managing Director and Business Development Officer, MCE Social Capital (moderator)
Tracy Kartye, Director of Social Investment, Root Capital Foundation
Teri Lovelace, President, LOCUS Impact Investing
Amy Mullen, Chief Development Officer, Root Capital

**12:00 - 12:15 PM**
**MOVE TO FIELD TRIPS (CHOOSE ONE)**

March 5 continues on page 14
Brooklyn Art, Culture, and a Community in Change

Organized with Hip Hop Caucus and Brooklyn Community Foundation

Like many of America’s major metropolitan areas, Brooklyn’s vitality and diversity has nurtured and attracted a thriving arts scene—a ecstatic tapestry of cultural expression and neighborhood pride. Three decades of aggressive development have brought major changes however in the borough’s landscape and demographics. How does art and culture fare in the midst of these pressures? And can local arts initiatives be a force for community stabilization and resident-driven growth? We’ll explore these questions through a short viewing of the some of the borough’s new mega buildings in the midst of burgeoning downtown Brooklyn, then we’ll travel to the largely African-American and Latinx areas of Bedford-Stuyvesant and East New York to visit with three community organizations that address art in the context of real-life challenges and the search for not only survival but viable economic opportunity.

Amy Cho, Program Officer, Brooklyn Community Foundation

Catherine Greene, Founder and Executive Director, ARTs East New York

Regine Rousain, Founder, Haiti Cultural Exchange

Youth Organizing Collective, HULLA, Speaker Pending

8:00 – 9:00 AM

ACTIVE OWNERS BREAKFAST:
GET INVOLVED IN 2019!
Room: Social Space

Shareholder engagement is one of the most powerful ways for investors to drive what they own and push for a change in the way business is conducted. During this learning breakfast meeting we will discuss the need for investor engagement, diving deeply into active ownership strategies (including voting proxies, advocacy, shareholder resolutions, and public statements). We will talk about the “hot” shareholder issues this year: ranging from climate, pay equity, to facial recognition software. Since 2019 it is expected that more than 400 environmental and social shareholder resolutions have been filed for spring meeting votes. Join us to learn about the latest active ownership trends, and how your organization can support these movements during the upcoming 2019 proxy season.

Speakers:

Andy Bahor, CEO, As You Sow (moderator)

Tim Dunn, Chief Investment Officer, Terra Alpha Investments LLC

Liza Haynes, Vice President, Institutional Investment Services, Boston Community Asset Management

Kelly Ryan, President and CEO, Inhouse Community Foundation

9:10 – 9:30 AM

WELCOME
Room: Meadow Rue

Stacey Faella, Executive Director, Woodcock Foundation

9:15 – 10:00 AM

KEYNOTE
Room: Meadow Rue

Joan C. Williams, Distinguished Professor of Law at the University of California, Hastings College of the Law

Described as having “something approaching rock star status” in her field by The New York Times Magazine, Joan C. Williams has played a central role in reshaping the conversation about work, gender, and class over the past quarter century. Williams is a Distinguished Professor of Law, Hastings Foundation Chair, and Founding Director of the Center for WorkLife Law at the University of California, Hastings College of the Law. Williams’ path-breaking work helped create the field of work-family studies and modern workplace flexibility policies.

Williams is one of the 10 most cited scholars in her field. She has authored 11 books, over 90 academic articles, and her work has been covered in publications from Oprah Magazine to The Atlantic. Her Harvard Business Review (HBR) article, “What So Many People Don’t Get About the U.S. Working Class” has been read over 3.7 million times and is now the most-read article in HBR’s 90-plus year history.

10:00 – 10:15 AM

BREAK
10:15 – 11:30 AM
DEMOCRATIZING FINANCE Room: Meadow Rue
To democratize finance, we must go beyond the world of high-end private investing and become inclusive of both retail investors and community-based decision-making processes. To achieve values-based investing at scale, there needs to be innovation in both the way investment dollars are sourced and how they are deployed for deepest impact. This discussion will engage philanthropic, community, and finance industry leaders to explore an array of solutions-oriented investment approaches that support the development of just and sustainable economies.

Speakers:
- Don Chan, President, Sudima Foundation (moderator)
- Jim Enote, Director, Colorado Plateau Foundation (moderator)
- Megan Thompson, Mission Investments Officer, Mission Investments, Ford Foundation
- Nick Hilton, President and CEO, NHC Collective, Oglala Lakota Tribal Member

12:00 – 1:15 PM
Special Luncheon: Investing in Native Communities Room: Aster
This special luncheon will highlight voices from social entrepreneurs who are developing opportunities to invest in Native Tribal Enterprises and community development projects across a range of return spectrums – from grants to market-rate returns. The luncheon is led by Jim Enote of Zuni Pueblo, a leading voice in philanthropy, and will also feature the voices of investors partnering with Native American communities.

Speakers:
- Jim Enote, Director, Colorado Plateau Foundation (moderator)
- Carla Fredericks, Director, American Indian Law Clinic at the University of Colorado Law School
- Lore Marcoline, Executive Director, Womadasi Fund
- Vanessa Roanhorse, Founder, Navajo RoanHorse Consulting
- Eva Schulte, Vice President for Economic Opportunity, Tiesis

11:30 AM – 12:00 PM
COMMUNITY REFLECTIONS Room: Meadow Rue
Join us to learn from and appreciate Confluence Members’ reflections on the field in an open-forum sharing session.

12:00 – 1:15 PM
LUNCH WITH AD HOC SESSIONS Room: Social Space

12:00 – 1:25 PM CONCURRENT SESSIONS

Beyond Quality Jobs: The Transformative Power of Worker-Ownership Room: Wood
Organized with the Libra Foundation, RSF Social Finance, and the Fund for Democratic Communities
In the spirit of truth and transparency, this panel will delve into how our practice can range from incremental change to strategies that result in true transformation. We will explore how supporting worker-ownership is one critical way investors can promote diversity, equity, and inclusion. This discussion will feature a mix of wealth inheritors, lenders, cooperative developers, and worker-owners. Each of the speakers, in their distinct roles, will share self-reflection and personal development has impacted their path and practice in the field.

Speakers:
- Alex Haber, Philanthropic Advisor, RSF Social Finance (moderator)
- Cathy Albina, Executive Director, National Economic and Social Rights Initiative (NESRI)
- Linda Diaz, President, Brooklyn Stone and Tile
- Brendan Martin, Founder & Director, The Working World
- Ed Whittled, Co-Managing Director, Fund for Democratic Communities

Transitioning to a 100% PRI Strategy Room: Blue
Organized with Tiedemann Advisors
What happens when a foundation accredits its use of Program Related Investments (PRIs) while downgrading the deployment of grant dollars? We will engage with the implications of scaling PRIs to 100% of a foundation’s 5% annual distribution, hearing from a variety of perspectives. While perhaps at odds with traditional philanthropy, the session will cover the investment, legal, tax, and moral considerations of this approach. The adoption of PRIs in the U.S. remains low on a relative basis, and this session seeks to highlight the added benefits of a fully integrated PRI strategy, drawing from a practitioner’s perspective.

Speakers:
- Brad Harrison, Directors, Tiedemann Advisors (moderator)
- Catherine Burnett, Chief Impact Officer, The Phillips Foundation
- Bruce Campbell, Chief Happiness Officer, Blue Oak Advocates
- Elizabeth Phillips, Executive Director, The Phillips Foundation

1:30 – 2:45 PM
Special Luncheon: “Yes, But Can It Scale?” The Role Philanthropy and Investment Towards Building an Impact Economy Room: Wood
Organized by Rockefeller Philanthropy Advisors
From both a micro and a macro lens, this discussion-oriented lunch session will tackle the question: What is needed today to build towards an impact economy? The discussion will be rooted in three years of leammings from the Scaling Solutions towards Shifting Systems project – a collaboration between Skoll, Ford, Porticus, and Rockefeller Philanthropy Advisors. Come for a lively discussion from two perspectives: the role of investment managers to help scale social businesses and the role of philanthropy towards building the broader field.

Speakers:
- Laura Callanan, Co-Founder, Skoll
- Robert and Catherine Burnett, President, Tides
- Carla Fredericks, Director, American Indian Law Clinic at the University of Colorado Law School
- Nick Hilton, President and CEO, NHC Collective, Oglala Lakota Tribal Member
- Don Chan, President, Sudima Foundation (moderator)
- Megan Thompson, Mission Investments Officer, Mission Investments, Ford Foundation
- Burt Johnson, President, Tides
- Heather Grady, Vice President, Rockefeller Philanthropy Advisors
- Eric Stephenson, Board Member, Condes Foundation
- Nick Hilton, President and CEO, NHC Collective, Oglala Lakota Tribal Member
Wednesday, March 6

2:45 - 3:00 PM
Break

3:00 - 4:00 PM
Book Fair and Book Signing
Room: Social Space
Join us for refreshments, pick up a book, and have it autographed by thought-leading authors from the Confluence community.

3:00 - 4:00 PM
Green Hotel Tour: 1 Hotel Brooklyn Bridge
Room: Hotel Lobby
1 Hotel Brooklyn Bridge has been designed to highlight the beauty of nature, combining eco-friendly luxury designs and an unrivaled level of service. With its unparalleled location, on the Brooklyn Bridge Park waterfront, guests will experience unobstructed views of the East River and Manhattan Skyline. Our vision is to create the most sustainable, beautiful and inspiring hotel experience. All of our events are designed to help us carry-out this vision. Features such as our 12-foot floor to ceiling windows in the social space that open into Brooklyn Bridge Park, offering an unobstructed view of the Lower Manhattan skyline and Brooklyn Bridge, showcase our open architectural design and provides connection with nature and our environment. 1 Hotel Brooklyn Bridge is unique in its 29 suites that can flow into a six-bedroom suite when needed, providing the ultimate in private and 24 hour in-room dining, state of the art fitness, a full Spa curated by Lady Bamford, 50 seat screening room, and private meeting areas filled with natural light.

4:00 - 6:00 PM
Free Time
Continue to mix and mingle. Impromptu run-ins with friends in the Brooklyn Heights Social Club or Neighbors Café. Take a nap. Get ready to party.

5:30 PM - Doors Open
6:00 - 10:00 PM
Climate Gala
Room: Meadow Rue and Social Space

7:00 - 7:30 PM
Evening Plenary: Building a True Climate Movement
Organized with Hip Hop Caucus
Confluence partners with Hip Hop Caucus to host a unique discussion about movement building in the context of climate change followed by a networking gala filled with surprises. The evening event aligns with the one-year anniversary of Hip Hop Caucus’ podcast series “Think 100%: The Coolest Show on Climate Change,” in honor of the anniversary and as a special treat for Confluence delegates, we will be hosting a live taping of the Think 100% anniversary podcast show.

This particular show centers around how vulnerable communities will be impacted and transformed by climate change and the role philanthropy and impact investing can play. The hosts and speakers will surface real-life examples, bring to light a conversation deeply rooted in solutions, and challenge how we truly put communities at the heart of those solutions before, during and after climate-related disasters strike. Together, we will explore the role foundations and investors play in supporting movement building and what our community needs to do to address the climate crisis.

Hosts:
Dr. Mustafah Santiago Ali, Environmental Justice Advocate and Co-Host, Think 100%
Antunette Smith, Grammy-Nominated Singer, Actress, Activist and People’s Climate Music Ambassador
Rev. Lennox Yearwood Jr., President and CEO, Hip Hop Caucus

Guests:
Ellen Dorsey, Executive Director, Wallace Global Fund
Amy Goodman, Journalist, Democracy Now!
Regina Hall, Actress, Climate Activist

Evening Entertainment
Performance by Antionate Smith, Grammy-Nominated Singer, Actress, Activist and People’s Climate Music Ambassador

Thursday, March 7

7:30 - 8:30 AM
Breakfast & Registration
Room: Social Space

8:45 - 9:00 AM
Morning Introduction
By Sharon Alpert, President and CEO, Nathan Cummings Foundation
Room: Meadow Rue

9:00 - 10:00 AM
A Discussion with Anand Giridharadas and Edgar Villanueva
Moderated by Deborah Fries, Co-founder and Board Chair, Boston Impact Initiative
Room: Meadow Rue
Sponsored by RSF Social Finance
Anand Giridharadas, author of Winners Take All
This is an exciting time for social innovation. Billions of dollars are flowing into philanthropy, market-driven solutions and social entrepreneurship are flourishing, and social impact consulting and impact investing have become established professions. Yet, in Winners Take All: The Elite Charade of Changing the World, Anand Giridharadas, a former New York Times foreign correspondent and current New York Times bestselling author, explains why we should not be so quick to celebrate our advances. Do the elite hijack social change? Anand shares a deeply compelling self-analysis to challenge an impact industry struggling with contradiction.

Edgar Villanueva, author of Decolonizing Wealth: Indigenous Wisdom To Heal Divides and Restore Balance
Edgar Villanueva is a nationally-recognized expert on social justice philanthropy and author of Decolonizing Wealth, which offers hopeful and compelling alternatives to the dynamics of colonization in the philanthropic and social finance sectors. He currently serves as Chair of the Board of Directors of Native Americans in Philanthropy and is a board member of the Andrus Family Fund, a national foundation that works to improve outcomes for vulnerable youth.

11:15 - 11:30 AM
Break

10:00 - 11:15 AM
Plenary: Is it Time to Stop Talking About “Impact Investing?”
Room: Meadow Rue
The term “impact investing” can stand in the way of capital deployment. All too often, as investors trip over themselves to define, articulate, and measure the elusive notion of “impact,” blank checks await a recipient and a signature. Is impact capital “dumb money?” Are impact investors somehow more morally correct than other investors? What if we dispensed once and for all with this perplexing moniker and instead adopted terminology that is more effective at getting money out the door? Through this interactive session, we will first evidence the fact that very few agree on what “impact” means. We will then propose a variety of terms that might break through the linguistic barriers to a lexicon that—finally—liberates capital. Audience polling and spirited debate will be used to stimulate this discussion. If nothing else, we might all agree that we really just want to be better investors.

Speakers:
James Bunch, Managing Director, AMBS Impact, Investment Management Division, Goldman Sachs (moderator)
Preeti Bhattacharji, Vice President, Integrated Capital, The Heron Foundation
Josh Mailman, President, Joshua Mailman Foundation
Robyn Steffens, Director, Impact Investing, Omidaq Network

March 7 continues on page 20

A lack of transparency results in distrust and a deep sense of insecurity.
- Dalai Lama

www.confluencephilanthropy.org
Collaborations in Climate Investing
Room: Meadow
Organized with John D. and Catherine T. MacArthur Foundation
Global leaders increasingly recognize that climate change poses a threat to progress, prosperity, and biodiversity. Within this context, and as the U.S. relaxes environmental regulations, should investors lead on the climate front? And how can collaborative efforts advance this leadership? In this session, presenters will share how they have developed, or are developing, large-scale collaborations around resilience, sustainable land use, energy access, and innovative financial structures to demonstrate the urgency and ambition in climate investing. We will explore considerations for implementing a collaborative investment model and show how effective collaboration can scale solutions.

Speakers:
- John Balbach, Associate Director, Impact Investments, John D. and Catherine T. MacArthur Foundation (moderator)
- Shilpa Patel, Director, Mission Investing, ClimateWorks Foundation
- Susan Phinney-Silver, Director, Mission Investing, David and Lucile Packard Foundation
- Ramsay Ravend, Executive Director, The Grantham Foundation for the Protection of the Environment
- Marilyn Waite, Climate and Finance Program Officer, William and Flora Hewlett Foundation

Clarity on Commitments: Not All Impact Investment Mandates are Created Equal
Room: Social Space
Organized with Ceniarth
As a field, we have developed a disturbing tendency to celebrate the announcement of any new impact investing commitment with equal fanfare, whether the move represents a truly pioneering approach or an incremental shift in the way assets are managed. But what do these commitments actually mean in practice? This session will feature a range of practitioners discussing the factors – historical constraints, financial return parameters, progressive leadership – that led them to pursue disparate strategies. The discussion will not be limited to specific asset classes, but will focus on how each investor approaches their strategy. We will discuss to what extent practitioners evaluate each investment for direct mission alignment and how/if investments are aligned with programmatic priorities. And we’ll explore how boards approved different strategic approaches and whether certain obstacles stood in the way of even more progressive options.

Speakers:
- David Sand, Chief Investment Strategist, Ceniarth LLC (moderator)
- Andrea Dobson, Chief Financial Officer, Winthrop Rockefeller Foundation
- Nick Flores, Director, Impact Investing, The Caprock Group
- Meredith Heimbürger, Board Member & Finance Committee Member, Cynthia and George Mitchell Foundation
- Napoleon Wallace, Board Member, Mary Reynolds Babcock Foundation

The Future of Banking
Room: Blue
Digital innovations like mobile banking and cryptocurrencies are disrupting the banking industry and creating stiff competition among traditional banks and emerging fintech ventures. This disruption has changed not only the way we buy, sell, borrow and invest, but it has altered the very definitions of currency and banks themselves. It has also pushed banks to better differentiate their products and align their investments with their customers’ values. In this small session, we will explore the banking industry’s latest disruptions – technological and otherwise – to better understand how banks will serve and be served by values-aligned investors in the future.

Speakers:
- Arjan Schütte, Founder and Managing Partner, Core Innovation Capital (moderator)
- Yana Kukar, Global Managing Partner, Dalberg Advisors

Speakers to be announced
THURSDAY, MARCH 7

12:45 – 2:00 PM
LUNCH WITH AD HOC SESSIONS
Room: Social Space

12:45 – 2:00 PM
SPECIAL LUNCHEON: RACIAL EQUITY INITIATIVE
Room: Blue Wood

How do we ‘speak truth to power’ in confronting the 11% of assets controlled by women and people of color-led investment firms and the less than 1% of individuals of color represented in senior positions at investment offices of foundations and private firms? Is there a widespread understanding of structural barriers, implicit bias, and microagressions that impede progress? Confluence began this vital yet murky conversation with an energetic group of 20 representatives of asset owners and managers in a January two-day retreat. This exciting discussion plus other aspects of Confluence’s Kellogg-funded “Racial Equity in Impact Investing Initiative” will be presented at this luncheon, which will invite engagement from all participants.

Speakers:
- Mallard “Mitty” Owens, Advisor to the President, Confluence Philanthropy (moderator)
- Dimple Abichandani, Executive Director, General Service Foundation
- Dana Lanza, CEO, Confluence Philanthropy
- Akasha Alakhe, Chief Consulting Office, Syntactic Investment Counsel

1:45 – 4:30 PM
MEMBERSHIP MEETING (MEMBERS ONLY)
Room: Aster

Join Confluence Philanthropy’s Board of Directors to hear officer, Syntrinsic Investment Counsel.

Speakers:
- Dan Cha, Executive Director – The Sierra Club Foundation
- Elena Varnum, Chief Investment Officer – The Solutions Project

2:45 – 5:15 PM
POST-CONFERENCE EVENTS WORKING GROUPS & MEETINGS

3:00 – 5:15 PM
POST-CONFERENCE EVENTS WORKING GROUPS & MEETINGS

Becoming Better Allies: A Workshop About Racial Equity and Inclusion
Room: Wood

Given the revelations of little more than 1% of the world’s global investments being managed by people of color, many in the Confluence community are seeking concrete steps towards greater “DEI” – diversity, equity and inclusion. Positioned as a post-conference activity, this session is designed to foster an informal, engaging, and candid conversation among all participants regarding the opportunities and practical challenges faced in shifting longstanding, mainstream behavior to accept the active cultivation of new networks and trusted financial partnerships with firms owned by people of color and/or benefiting communities of color. We will hear insights from foundation leaders and investment managers about the significant efforts they have undertaken, followed by an open exchange on the obstacles people may be experiencing and practical means of overcoming these challenges. The session will include a brief review of some important concepts in the development of historical and structural discrimination and explore a common framework regarding the concepts underlying DEI. Like the other events regarding DEI at this Gathering, this session will help to strengthen the foundation for Confluence’s continuing Racial Equity in Investments Initiative.

Speakers:
- Alexandra Aquino-Fike, Vice President of Development, East Bay Community Foundation
- Amy Chung, Director of Program Related Investments, The California Endowment
- Rodney Foxworth, Executive Director, Alliance for Local Living Economies (BALLE)
- Ivy Jack, Head of Equity Research, Nonprofit Asset Management

Filling the Gap: Bringing New and Different Investments into Reproductive Health
Room: Aster

Organized with Jessica Smith Noyes Foundation and Tara Health Foundation

Reproductive health is underinvested in, due to political complexities, challenging market conditions, and uncertain returns. The Reproductive Health Investors Alliance will bring new private-sector business models to reproductive health and justice efforts with the backing of committed philanthropies, family offices, venture investors, and private individuals. In this working group session, we will discuss opportunities that can benefit from private investment models, and we will share our learnings from the early days of the Alliance’s history.

Speakers:
- mini Banerjee, Interim Executive Director, Jessica Smith Noyes Foundation
- Lisa Hammann, COO, Tara Health Foundation

Traveling the Road of Buen Vivir: Lessons learned since launching a community-led fund
Room: Meadow

Organized with Thousand Currents

The Buen Vivir Fund was co-designed by Thousand Currents, its grassroots partners in the Global South, and financial investors to support grassroots economic initiatives that build wealth, community power, and Buen vivir - ‘right living’, or life in balance with natural systems and future generations. Buen Vivir Fund started as a learning experiment and launched its first round of investments in 2018 to support nine remarkable projects in different parts of the world. In this session, members of the Buen Vivir Fund will share their learnings, challenges, and successes, in the spirit of truth and transparency, as they developed a model that brought love and money into a healthier relationship with one another. The session will include a visionary exercise, interactive presentation, and small group discussions on operationalizing an impact investing fund in which capital can flow in service of well-being. Come hear what these visionary leaders have to say about our shared future in investing!

Speakers:
- Rajiv Khanna, Director of Philanthropic Partnerships, Thousand Currents
- Nina Robinson, Buen Vivir Finance Fellow
- Gaithiti Siva, Buen Vivir Finance Fellow
- Cecilio Solis, CEO (Indigenous and Local Community Federation of Entrepreneurs of Mexico)

Pathways to Community Solar:
C2C Working Group Meeting
Room: Social Space

Organized with Libra Foundation and California Clean Energy Fund

Everyone is welcome to the Climate Solutions Collaborative’s ‘minds-on’ workshop about building the community solar industry-ecosystem. We’ll hear from the frontline community leaders, intermediaries, and investors as they share their frustrations, visions for partnership, and success stories. If you are curious about this landscape, building your own strategy, or a solar veteran, join us to learn about who’s doing what where, and how. Open discussion will be the format.

Speakers:
- Aner Ben-Ami, Managing Director, Candie Group (moderator)
- Lyn Benander, CEO, Co-Op Power
- Wondolyon Holland, Holland Consulting
- Ken Locklin, Senior Advisor, Clean Energy Finance, Energy Foundation
- Rudi Navarra, Director of Investments, The Solutions Project
- Stephanie Spiris, Co-Founder and CEO, Solitude
ANAND GIRIDHARADAS
Anand Giridharadas is the author of The New York Times bestseller *Winners Take All*, *The True American* (soon to be a feature film), and *India Calling*. He was a foreign correspondent and columnist for The New York Times from 2005 to 2016, and has also written for The Atlantic, The New Yorker, and The New Republic. He is a former McKinsey analyst, an Aspen Institute fellow, a visiting scholar at New York University, an on-air political analyst for NBC News. His writing has been honored by the Society of Publishers in Asia, the Poynter Fellowship at Yale, and the New York Public Library’s Helen Bernstein Award. He lives in Brooklyn, New York.

ANGELA GLOVER BLACKWELL
Angela Glover Blackwell, Founder in Residence, started PolicyLink in 1999. Under Angela’s leadership, PolicyLink gained national prominence in the movement to use public policy to improve access and opportunity for all low-income people and communities of color, particularly in the areas of health, housing, transportation, and infrastructure. A lawyer by training, she was also a partner at Public Advocates, served as Senior VP at the Rockefeller Foundation, and founded the Oakland (CA) Urban Strategies Council. Angela is the co-author of *Uncommon Common Ground: Race and America’s Future* (WW Norton & Co, 2010), and author of *The Curb-Cut Effect*. Angela serves on numerous boards, and she also advises the Board of Governors of the Federal Reserve as one of 15 members of its Community Advisory Council.

EDGAR VILLANUEVA
Edgar Villanueva is a nationally-recognized expert on social justice philanthropy and author of *Decolonizing Wealth*, which offers hopeful and compelling alternatives to the dynamics of colonization in the philanthropic and social finance sectors. He currently serves as Chair of the Board of Directors of Native Americans in Philanthropy and is a Board Member of the Andrus Family Fund, a national foundation that works to improve outcomes for vulnerable youth. Additionally, Edgar is an instructor with The Grantmaking School at the Johnson Center at Grand Valley State University and Vice President of Programs and Advocacy at the Schott Foundation for Public Education. There he oversees grant investment and capacity-building supports for education-focused justice campaigns across the United States. Previously Edgar has held leadership roles at Kate B. Reynolds Charitable Trust in North Carolina and at the Marguerite Casey Foundation in Seattle. In addition to working in philanthropy for many years, he has consulted with numerous nonprofit organizations and national and global philanthropies on advancing racial equity inside of their institutions and through their investment strategies. Edgar holds two degrees from the Gillings Global School of Public Health at The University of North Carolina Chapel Hill. He is an enrolled member of the Lumbee Tribe of North Carolina and resides in Brooklyn, NY. Follow him on Twitter at @VillanuevaEdgar.

JOAN C. WILLIAMS
Described as having “something approaching rock star status” in her field by The New York Times Magazine, Joan C. Williams has played a central role in reshaping the conversation about work, gender, and class over the past quarter century. Williams is a Distinguished Professor of Law, Hastings Foundation Chair, and Founding Director of the Center for WorkLife Law at the University of California, Hastings College of the Law. Williams’ path-breaking work helped create the field of work-family studies and modern workplace flexibility policies. Williams is one of the 10 most cited scholars in her field. She has authored 11 books, over 90 academic articles, and her work has been covered in publications from Oprah Magazine to The Atlantic. Her Harvard Business Review (HBR) article, “What So Many People Don’t Get About the U.S. Working Class” has been read over 3.7 million times and is now the most-read article in HBR’s 90-plus year history.
Tiedemann Advisors is one of the largest independent investment and wealth advisors for high-net-worth individuals, families, trusts, foundations and endowments. Founded in 1999, Tiedemann has eight offices across the U.S. and offers our clients customized wealth management and impact investing services. Our mission is to help our clients realize the full potential of their assets and achieve what matters most to them.

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Veris and Confluence are committed to disrupting the status quo to create a more sustainable world.

We’re working together to transform capital into a positive force for change.

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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The Confluence Practitioners Gathering is created through a unique democratic process. Members of the Practitioner 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 to plan those sessions. We would like to both congratulate and thank those members who have helped to shape the 9th 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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SPECIAL EVENT ORGANIZERS
Hip Hop Caucus

Connectivity enables transparency for better government, education, and health.

- Bill Gates
CONFLUENCE PHILANTHROPY

Confluence Philanthropy advances mission-aligned investing. We support and catalyze a community of private, public and community foundations, families, individual donors, and their values-aligned investment advisors representing over $3.5 trillion in managed capital. 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, and programmatic missions, and play various personal and professional roles, they all share a commitment to mission-aligned investing.

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.

BOARD MEMBERS

Dan Chu, Executive Director, Sierra Club Foundation
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Board Chair
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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.

Membership does not translate into the promise of speaking engagements at our events nor do we offer speaking engagements in exchange for sponsorship. 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.

JOIN THE LEADERSHIP OF CONFLUENCE PHILANTHROPY!

Are you excited by the idea of building the field of values-based investing? Would you like to collaborate with like-minded colleagues? 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

By providing vision, leadership, and accountability, the Board of Directors plays a vital role in ensuring Confluence continues to build the field 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 success 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;
Help strengthen and broaden the importance of Confluence’s programs;
Assist in building the field by developing strategic initiatives and taking on leadership roles that further communication and collaboration;
Develop beneficial and enjoyable relationships with peers outside of their own programmatic and geographic scope.

Participation on the Board of Directors is currently open only outside of their own programmatic and geographic scope.

Confluence’s programs;
Help strengthen and broaden the importance of
Assist in building the field by developing strategic initiatives and taking on leadership roles that further communication and collaboration;
Develop beneficial and enjoyable relationships with peers outside of their own programmatic and geographic scope.
Participation on the Board of Directors is currently open only to 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.

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 program. The Committee meets seasonally by phone as a group and collaborates strategically with Confluence staff throughout the year. Investors and Advisors who are members in good standing are eligible to serve on the committee. To learn more about joining the Membership Committee, contact Dana Lanza, CEO.

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 and Fundraising Committee, contact Dana Lanza, CEO.

CONFLUENCE PHILANTHROPY

TRUTH

TRANSPARENT

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ACTIVE OWNERS WORKING GROUP

The Active Owners Working Group focuses broadly on the importance of transparency and accountability in governance – whether within the board room or on Capitol Hill. This group uses educational programs, network building, and cross-sector collaboration to raise the level of discourse and action among investors committed to using their asset ownership as a tool to support and strengthen our true 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” to 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. 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 private and philanthropic capital towards a low-carbon economy. C2C’s aims to bring market-based climate solutions to scale and to make the field of climate investing more connected, active, and effective.

RAINMAKERS INVESTMENT COLLABORATIVE (RIC)

The Rainmakers Investment Collaborative (RIC), a coordinated group of mission-related investors spearheaded by Confluence Philanthropy, has raised a total of $3.35 million in PRI and grant investments to Native communities in New Mexico and Arizona. Developed to address the lack of investment in tribal communities, RIC aims to fund affordable housing, small businesses, and agricultural development (among other focus areas) in rural communities across the Southwest. RIC selected RCAC—a community development financial institution (CDFI) with a long lending history and expertise in rural communities—as the intermediary partner after a competitive selection process. The Collaborative aims to raise a total of $4 million in PRI investments by 2019. Grant funding will support RCAC’s expanded work in Native communities and partnerships with Native CDFIs such as Native Capital Access, based in Arizona.

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

CONFLUENCE STAFF
David Estrada, Managing Director
Elizabeth Gilbert, Membership Manager
Dana Lanza, Chief Executive Officer
Brett Metzger, Operations Director
Nishi Moonka, Vice President of Programs
Jane Ochs, Scheduler
Millard “Mitty” Owens, Advisor Program Director
Chaneice Robinson, Operations and Development Coordinator
Kate Simpson, Advisor Membership Associate
Siddharth Thakur, Program Director

SPECIAL ACKNOWLEDGMENTS: THANK YOU FOR YOUR SPECIAL SUPPORT!

Event Planning Consultants
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Rick Fowler, Q & A Events
Daniel Buckwald, Graphic Designer

The financial crisis is a stark reminder that transparency and disclosure are essential in today’s marketplace.

– Jack Reed

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I can’t believe what you say, because I see what you do.

– James Baldwin