Confluence Philanthropy's 10th Annual Practitioners Gathering

The Decisive Decade
February 25 – 27, 2020

Puerto Rico

#OWNWHATYOUOWN
Hurricane Maria hit Puerto Rico hard and showed the world how some of the worst effects of our changing climate can impact vulnerable communities. Devastated but not destroyed, Puerto Rico and its vision of rebirth remain beautiful and inspirational. After the storm passed, the island’s recovery proved to be both a physical and emotional challenge that benefited from the warmth of its people, their strong and vibrant culture, and their unyielding resilience. While work still remains, the hurricane gave way to seeding a local foods movement seasoned with cultural pride and fostered a commitment to local renewable energy and sustainability practices.

For all these reasons, we couldn’t think of a more potent venue to host Confluence Philanthropy’s 10-Year Anniversary Practitioners Gathering, the theme of which is “THE DECISIVE DECADE.” As we look toward a climate-impacted future and the social, political, and financial challenges we face over this next decade, we must move beyond dialogue to tangible action. The 2020 Gathering will be pivotal.

If a few children can get headlines all over the world just by not going to school then imagine what we could all do together if we really wanted to.

— Greta Thunberg
### TUESDAY, FEBRUARY 25

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 AM</td>
<td>Conference Registration Opens</td>
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<tr>
<td>8:30 AM</td>
<td>Local Excursions</td>
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<tr>
<td>9:00 AM</td>
<td>Welcome Intensive (Investor only)</td>
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<tr>
<td>10:00 AM</td>
<td>Kellogg Event (by invite only)</td>
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<tr>
<td>11:30 AM</td>
<td>Break</td>
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<tr>
<td>12:00 PM</td>
<td>Learners &amp; Practitioners Lunch</td>
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<tr>
<td>1:00 PM</td>
<td>Learners Institute (consecutive sessions)</td>
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<tr>
<td>1:00 PM</td>
<td>Practitioners Institute</td>
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<tr>
<td>4:00 PM</td>
<td>Break</td>
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<tr>
<td>5:15 PM</td>
<td>Break</td>
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**Monday, February 24**

- 6:00 PM: Gratitude Dinner (by invite only)
- 6:30 PM: Welcome Reception and Dinner

**Monday, February 24**

- Bombo Beach Party and Dinner in Celebration of Confluence Philanthropy’s 10-Year Anniversary

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### WEDNESDAY, FEBRUARY 26

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 AM</td>
<td>Breakfast and Registration</td>
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<tr>
<td>8:00 AM</td>
<td>Active Owners Working Group Breakfast</td>
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<tr>
<td>8:00 AM</td>
<td>Racial Equity Breakfast</td>
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<tr>
<td>9:10 AM</td>
<td>Welcome</td>
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<tr>
<td>9:30 AM</td>
<td>Plenary Session</td>
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<tr>
<td>10:45 AM</td>
<td>Break</td>
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<tr>
<td>11:00 AM</td>
<td>Fish Talk</td>
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<tr>
<td>11:15 AM</td>
<td>Community Reflections</td>
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<tr>
<td>12:00 PM</td>
<td>Lunch</td>
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<tr>
<td>1:00 PM</td>
<td>Membership Meeting (Members Only)</td>
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<tr>
<td>2:00 PM</td>
<td>Break</td>
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<tr>
<td>2:15 PM</td>
<td>Concurrent Interactive Sessions</td>
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<tr>
<td>3:30 PM</td>
<td>Free Time</td>
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<tr>
<td>5:30 PM</td>
<td>Gather for the Evening Plenary and Gala</td>
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<tr>
<td>6:00 PM</td>
<td>Evening Plenary</td>
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<tr>
<td>7:30 PM</td>
<td>Gala Networking Dinner and Salsa Party</td>
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### THURSDAY, FEBRUARY 27

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 AM</td>
<td>Investing in the Future of Puerto Rico - Special Breakfast Session</td>
</tr>
<tr>
<td>8:45 AM</td>
<td>Morning Welcome</td>
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<tr>
<td>9:00 AM</td>
<td>Plenary Session</td>
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<tr>
<td>10:00 AM</td>
<td>Keynote</td>
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<tr>
<td>10:40 AM</td>
<td>Break</td>
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<tr>
<td>10:55 AM</td>
<td>Concurrent Concurrent Interactive Sessions</td>
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<tr>
<td>12:10 PM</td>
<td>Lunch for those not attending Field Trips</td>
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<tr>
<td>12:30 PM</td>
<td>Post-Conference Field Trips or Workshop (Prior Registration Required)</td>
</tr>
</tbody>
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*The fun for me in collaboration is, one, working with other people just makes you smarter: that's proven.*

— Lin-Manuel Miranda
JOIN A THEMATIC CONFERENCE TRACK!
LOOK FOR THESE ICONS.

CLIMATE SOLUTIONS TRACK
The Climate Solutions track aims to amplify the urgency of the climate crisis, while exemplifying real investment solutions. This year’s sessions emphasize collaboration, bringing solutions to scale, community-based energy projects, just transition, and resilience, and will include a special evening event about how we can build an honest, pluralistic movement to address climate change.

DIVERSITY, EQUITY & INCLUSION (DEI) TRACK
The DEI Track features the unique perspectives and powerful voices of women and people of color in the investment industry. The year’s focus area is grounded in the peoples of Puerto Rico, investing with a racial equity lens; issues of gender and sexual identity; and climate justice. Join us Wednesday morning for the annual Racial Equity Breakfast and Thursday morning for a special session about investing in Puerto Rico.

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-to’s” about selecting an advisor; practicing full portfolio activation; and thinking about public equities. Join us Wednesday morning for the Annual Active Owners 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 inclusive decision making; deregulating banking; evolving ESG strategies; investing in rural communities; and much more.

PLACE-BASED TRACK
The Place-Based track showcases the unique perspectives, voices, practices, of those who call Puerto Rico “home”. We are honored to collaborate with our local partners in this very special place for our ten year anniversary conference.

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 the 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.
**HOTEL**

**BALLROOM LEVEL**
- Tropicoro
- Lobby
- Gold Ballroom
- Stage
- Gran Ballroom
- Ballroom C
- Ballroom B
- Ballroom A
- Terrace

**MEETING LEVEL**
- Tropicoro
- Lobby
- Gold Ballroom
- Stage
- Grand Ballroom
- Ballroom C
- Ballroom B
- Ballroom A
- Terrace

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**EL SAN JUAN HOTEL**
6063 Isla Verde Avenue Carolina
Puerto Rico 00979

**TAXI**
El San Juan Hotel is a short five minutes from the San Juan Luis Muñoz Marín Airport (SJU). Taxi service is readily available.

**PARKING**
We offer secure and covered parking with in and out privileges. Self and Valet parking are available.
EL SAN JUAN HOTEL

Designed by legendary Miami Beach architect Morris Lapidus, El San Juan Hotel officially welcomed locals and tourists alike beginning February 1, 1958. Throughout the 1960s, Puerto Rico became a beacon for American tourists and entertainers, and El San Juan Hotel followed as the grand dame of authentic Puerto Rican hospitality and entertainment. During the hotel’s first three decades, internationally renowned headlines performed on its stage each week, including Sammy Davis Jr., Nat King Cole, Frank Sinatra, Eddie Fisher, Carol Channing and Liza Minnelli, among other icons of the time. Fast forward to today, and El San Juan Hotel remains a timeless Puerto Rican icon, seamlessly blending the best elements of yesterday, today, and tomorrow.

HOTEL POLICIES

Check-in and Checkout
Check-in time is after 4:00 pm. Check-out time is 11:00 am. If you desire a late checkout and your room is available, a half-day room rate will apply up to 6:00 pm. A full day rate will apply to guests wishing to depart after 6:00 pm. Early Departure Fee: One night’s room rate plus tax based on that evening’s rate. The minimum age to register is 21.

Resort Charge
In addition to the room rate, a Daily Resort Fee of 18% will be added to the room rate. This fee covers a variety of guest services, including: Internet access, in-room bottled water, unlimited local and toll-free calls, Lobby entertainment admission to BPAKUA, 24-hour fitness center, Beach lounge chairs, Pool & beach toys, games, and activities.

Dress Code
We are happy to welcome you to the playfully elegant atmosphere at El San Juan Hotel. We appreciate your adherence to our dress code. During the day, we encourage casual, comfortable and appropriate attire. In the lobby and restaurants, shirts or a cover-up are required and bare feet are not permitted. In the evening, our atmosphere transforms into upscale elegance. For the comfort of you and those around you, we appreciate your support of this chic and elegant standard.

LAUNCH AN INNOVATIVE SPA AND HEALTH RETREAT

Discover an exceptional fusion of spa and wellness at Well & BEING Spa, El San Juan, Puerto Rico. This unique spa retreat located in Puerto Rico offers you personalized programs that infuse life with a greater sense of vitality. Discover the motivating kick-start of a new, evidence-based approach to nutrition and exercises, designed to transform you from the inside out.

Spa Hours & Fitness Facility
The spa is open daily from 9:00 am. – 7:00 pm. The fitness facility is open 24 hours.

GET THE APP!

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...
- Open up your device’s web browser and visit https://guidebook.com/g/confluencegathering2020/
- Search for “Guidebook” in the Apple, Google, or Amazon app stores
- Scan the QR code to the right with your phone’s QR scanner

DRINKS AND DINING

CAÑA BY JULIANA GONZALEZ

Discover the inspired cuisine that put the Island of Enchantment on the map, seamlessly blended with authentic Puerto Rican flavors by Chef Juliana Gonzalez. Each one-of-a-kind dish invites guests to celebrate San Juan’s traditions old and new, with the international zest and fresh ingredients Chef Gonzalez is known for. Enjoy breakfast, lunch, cocktails and dinner daily at our indoor space or at the covered terrace overlooking the Well & BEING pool. Outdoor bar and pool services is available. Visit the restaurant for opening hours.

AQUARELLE ON THE BEACH

Posed along the shore of San Juan’s lively Isla Verde Beach, Aquarelle invites guests to dine on coastal cuisine inspired by its timeless island surroundings. Featuring water-to-table seafood and inventive cocktails that reimagine local flavors with a modern palette, Aquarelle will become a renewed San Juan favorite for beachfront dining. Visit the restaurant for opening hours.

MEAT MARKET

Meat Market serves up a livelier, more glamorous twist on a traditional steakhouse. Executive Chef Sean Brasel constructs an inspiring selection of best in class dishes, from the unparalleled raw bar, to creative appetizers, to excellent cuts of meat, seasoned with unique marinades designed to enhance their quality and flavor. Girls Night Out: Thursdays, 5:00 pm - 9:00 pm. Enjoy a complimentary glass of Sparkling Wine or Special Cocktail and happy hour all night, exclusively for the ladies at the Meat Market bar. Visit the restaurant for opening hours.

IL SOLE PIZZERIA

Discover this family-run restaurant with casual Italian fare serving pizza, salads and sandwiches, tucked in The Shops of El San Juan Hotel. Open daily from 5pm to 11pm.

EL BISTRO

Located in the lobby of El San Juan Hotel, El Bistro features daily breakfast, lunch and late-night offerings. By day, indulge in a variety of local gourmet coffees and grab-and-go fare—from delicious baked breads and fresh fruit, to sandwiches and salads. By night, delight in curated tapas, a raw bar, and desserts, the perfect accompaniment to an evening of revelry. Open Daily: 6:00 am - 2:00 pm
**LOOK WHO’S HERE!**

**Attendees by Profession**

- **Investors**: 62%
- **Advisors**: 27%
- **Other**: 11%

**Speakers by Gender**

- **Female**: 57%
- **Male**: 43%

**Countries Represented**

- **Canada**
- **United States**
- **United Kingdom**
- **Switzerland**
- **Mexico**
- **Puerto Rico**
- **Trinidad**
- **United Arab Emirates**

**Investor AUM**: $60.4 Billion • **Advisor AUM**: $11.4 Trillion

**Speaker Diversity**

- **White**: 42%
- **People of Color**: 58%

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**CONFERENCE HIGHLIGHTS**

**SPECIAL BREAKFAST SESSIONS**

- **Active Owners Breakfast | Secrets in the Islands: Predatory Money in the Caribbean**
  Organized with The Ocean Foundation and the Active Owners Steering Committee
  This panel will explore dangerously damaging practices and what investors can do to protect their values and bring dark money to light.
- **Racial Equity Breakfast**
  Organized with California Wellness Foundation
  After a brief update about Confluence’s Racial Equity Initiative, participants will hear from leaders in the field about their vision for implementing racial equity strategies.

**MEMBERSHIP MEETING**

Join us to learn about our refreshed mission statement and hear the call to action!

**GALA PLENARY**

Join us for a provocative discussion about climate movement building and comedic relief!

**GALA CELEBRATION AND NETWORKING EVENT**

Join us for a networking dinner and salsa dancing to follow.

**INVESTING IN THE FUTURE OF PUERTO RICO**

Please join a spirited early morning conversation about how to partner with local businesses and investment managers. This will be a discussion on both the grantmaking and investment sides of the balance sheet.

**FIELD TRIPS (PRIOR REGISTRATION REQUIRED)**

- **Decolonizing Wealth: How to Use Money as Medicine: A Special Workshop with Author, Edgar Villanueva and Vanessa Roanhorse**
  This workshop will be held at the El San Juan Hotel and begins at 12:30pm

- **Investing in a Just Transition in Puerto Rico: An Estuary Exploration by Boat**
  Join practitioners in a shared learning opportunity to explore local solutions to resilience among communities in the environmentally degraded Caño Martín Peña neighborhood, a 3.5-mile long natural tidal channel that is part of the San Juan Bay Estuary.

- **Investing in Island Entrepreneurship**
  Field trip participants will hear from entrepreneurs, accelerator coordinators and key partners nurturing investment in innovation for some of the island’s key sectors such as tech, food security and waste management.

- **Exploring the Investable Landscape: Hike El Yunque National Forest**
  The hike will be led by a local tour guide, with expert investor insights from Ecotrust Forest Management.

- **How a Disaster Seeded a Local Food Movement**
  This fisheries fieldtrip features local producers who offer unique stories, relevant to Puerto Rico and beyond.

**LOCAL EXCURSIONS**

- **“Wellness Welcome”- Relax with yoga and poolside networking to follow**
  Enjoy this all level Vinyasa Flow workout. The Yoga class is followed by a casual networking reception poolside.

- **Seeking San Juan: A Walking Tour of Old San Juan’s Waterfront**
  Join a small group of fellow urban explorers for a 2.5 hour guided walking tour of Old San Juan. Easy snacks can be found along the way!

- **Paddle Boarding**
  Hoping to get out on the water before you hit the conference rooms? Jump on the paddleboard adventure at nearby Condado Lagoon Natural Reserve. Experienced paddlers can take off on their own! Time on the water = 1.5 hours.

**10th Annual Practitioners Institute: Vision 20/20: Reflect and Protect**

This afternoon session brings together some of the institutions and individuals that helped launch Confluence for reflection and provocative discussion. Join us for large group discussion about where we’ve found ourselves and where we go from here.

**CONNECT WITH THE COMMUNITY ON SOCIAL MEDIA!**

@ConfluenceP

www.facebook.com/Confluencephilanthropy

www.linkedin.com/company/confluence-philanthropy

#ownwhatyouown

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.
TUESDAY 2/25

AGENDA

8:30 AM

AGENDA

8:30 AM

WELCOME INTENSIVE
ROOM: BENNETT 1 & 2
Recommended for New Members and Gathering Newcomers!

The Welcome Intensive provides an introduction to the concepts of values-based investing in an expert-led, small group setting. This program is intended for asset owners new to values-based investing and offers a unique opportunity to dive into the Confluence community with a cohort of new peers and allies. Facilitators will lead a morning discussion group about fiduciary duty, engaging investment advisors, and other topics critical to new investors.

The Welcome Intensive will conclude with a special lunch hosted by the facilitators and Confluence staff.

Trainers:
Katherine Knoll, Sustainable Investing Analyst, Brown Advisory
Tom Mitchell, Managing Director, Cambridge Associates

Speaker:
Adam Cummings, Trustee, The Nathan Cummings Foundation

10:30 AM

LEARNERS & PRACTITIONERS LUNCH
ROOM: BALLROOM B

PRACTITIONERS INSTITUTE - VISION 20/20: REFLECT AND PROTECT
ROOM: BALLROOM C
Open to all Confluence Practitioner Member Delegates

Ten years ago the concept of impact investing was born from the 2008 financial crisis and became an inspiration for a new way to invest with values. Over the past decade the industry has grown in ways beyond our best held dreams, and in others ways, not quite as much as we’d hoped.

This afternoon session brings together some of the industries and individuals that helped launch Confluence for reflection and provocative discussion about how far we’ve come, and the journey ahead as we seek to protect the original spirit of values-based investing at a time when competing forces are battling for control of the economy.

Join us for large group discussion about where we’ve found ourselves and where we go from here.

Welcome Remarks
Suzanne Biegel, Chair, CalStrays, CalStrays at Large, and Co-Founder, CandorSmart Investing Summit

Greg Ratliff, Vice President, Rockefeller Philanthropy Advisors

Opening Discussion
Jed Emerson, Founder, Blended Capital

Dana Lanza, Co-Founder & CEO, Confluence Philanthropy

Reflections and Group Discussion with Asset Owners

Speakers:
Steve Godake, Good Capital Consulting and Confluence Co-Founder (Moderator)
Regan Priftzker, Board Member, Lime Foundation

Reg Ramesy, Independent Trustee, Member of the Investment Committee and interim CEO, Nathan Cummings Foundation

Emira Woods, Trustee, Wallace Global Fund

3:00 PM

Closing Reflections
Lisa Renstrom, Board Member, Beneficial Social Investments, and Confluence Board Member

LEARNERS INSTITUTE
ROOM: BENNETT 1 & 2
Open to all Registered Delegates

Diversity & the Impact of Your Investments
Organized with Aperio Group

With social diversity now a growing concern among value-minded asset owners, what are the most effective points of leverage within an asset owner’s control? Is the field developing a better understanding of tools that investors can use to effect better social equity outcomes? What are the questions we should ask for each asset class, and what is realistic in terms of responses and time frame?

Speakers:
Liz Michaelis, Chief of Staff and Director of ESG/SRI, Aperio Group (Moderator)
Cara Early, Assistant Vice President, Brechinbridge
Tamar Larsen, Executive Director, Aggie/PNP

Break

3:25 PM

Reflections from Foundation Leaders
Speakers:
Greg Ratliff, Vice President, Rockefeller Philanthropy Advisors (Moderator)
Stacey Failla, Executive Director, The Woodrow Wilson Foundation
Jim Jensen, Former Executive Director, Park Foundation & Confluence Co-Founder

Cynthia Muller, Director of Mission Investing, W.K. Kellogg Foundation
Susan Pinney Silver, Director of Mission Investing, David and Lucile Packard Foundation

Reflections and Group Discussion with Investment Advisors
Speakers:
Matthew Weatherly-White, Managing Director, Caprock (Moderator)
Patricia Ferrar-Rivas, CEO, Nava Wealth Partners

Raul Pomares, Founder & Managing Director, Sonen Capital
Jeff Scherer, Managing Director, Paladin
Jason Scott, Board Member, Encourage Capital

Break

4:00 PM

3:55 PM

Practicum for Public Entities
Organized with Zevin Asset Management

Whether the issue is climate change, poor labor standards, or racial equity, finding alignment between foundations’ investment portfolios and their grantmaking missions is often challenging. In this session, participants will learn about investment and engagement strategies to move companies away from socially and environmentally damaging practices.

The group will explore questions key to all foundations: What do we own? Where should we divest or invest? How can we use our investor voice and influence to move the economy away from harm to people and planet, and towards regeneration? Participants will analyze a model stock portfolio and identify troubling companies and sectors, using example frames provided by the facilitator to screen company lists. Then they will discuss impactful stock portfolio strategies, deciding between divestment, shareholder advocacy, or a blended approach.

Speakers:
Sonja Kowel, President, Zevin Asset Management (Moderator)
Tim Dunn, Chief Investment Officer and Founder, Terra Alpha Investments LLC
Lisa Hayles, Vice President of Institutional Investment Services, Boston Common Asset Management

Break

4:00 PM

4:05 PM

BOMBA BEACH PARTY AND DINNER IN CELEBRATION OF CONFLUENCE PHILANTHROPY’S 10-YEAR ANNIVERSARY LOCATION: AQUADELLE ON THE BEACH

Registered Delegates & Invited Guests Only

Party Theme: Circular Economy: Thrift Your Island-Year Attendants are encouraged to engage in the circular economy and wear their most fun thrifted or repurposed island wear. The more creative and colorful the better!

Create a Healthy Decision-Making Culture Organized with Synthesis Investment Council

Historically, foundations have sliced the management of their investments and their grant-making, effectively relegating the expression of mission to just 5% of the endowment. The past decade, however, has seen an uptick in the push for foundation boards and investment committees to consider a more synergistic and impactful deployment of their full weight and resources. Guided by advisors steeped in this dialogue, this session will explore the building blocks of fostering a healthy decision-making board culture that nurtures critical discussion and enables the emergence of shared values toward the alignment of mission and fiduciary responsibility.

Speakers:
Ben Valore-Caplan, Chief Executive Officer, Synthesis Investment Council (Moderator)
Krisi Petrie, Executive Director, AAF Foundation
Bill Reppinger, CFO, General Service Foundation

Break

4:05 PM

4:10 PM

4:00 PM

4:10 PM
WEDNESDAY 2/26

AGENDA

8:00 AM

AGENDA

Welcome to Confluence Board Room A

Mark Spalding, President, The Ocean Foundation and Chair, Confluence Board of Directors

Dr. Nelson Colón, President, Puerto Rico Community Foundation

PREAMBLE SESSION

Using Systems Thinking to Embrace the Whole

Organized with Climate Interactive and Rockefeller Philanthropy Advisors

Many would say that the challenges that we face today are a function of system failures. Political leadership, the economy, corporate governance, personal high debt, race relations, international trade, and uncontrolable weather events... Whew! Sometimes we fixate upon parts of the system and miss the whole. How can impact investors hold more of a systems view when making a simple investment decision? In this session, we will hear from systems modelers about how we can use systems thinking to craft holistic approaches to the multitude and magnitude of the questions that we grapple with. Crisis is a both challenge and an opportunity. How do we steer toward our goal like justice, equity, and a stable climate amidst all the complexity?

Flashtalk by Dr. Elizabeth Sawin, Co-Founder and Co-Director, Climate Interactive

Panel Speakers:

Santhosh Ramdaso, Principal, Shell Foundation (Moderator)

Rachel Payne, Managing Director, FullCycle, and Founder, The Tree Pledge

Dr. Elizabeth Sawin, Co-Founder and Co-Director, Climate Interactive

Erica Barboa Vargas, Director of Solutions Finance, McDonnell Foundation

9:30 AM

MEMBERSHIP LUNCH MEETING (MEMBERS ONLY)

LUNCH

Using Systems Thinking to Embrace the Whole

Organized with California Wellness Foundation and Amalgamated Bank

In order to avoid a temperature rise above 2°C pre-industrial levels and meet the goals outlined in the Paris Accord, we need to slash carbon emissions by 45% below 2010 levels by 2030. To get there, we need to significantly shift the financing away from carbon intensive industries (such as coal, oil and gas, internal combustion engine vehicles, and non-regenerative agriculture) and towards climate solutions. Join the session to learn about how we can drive this change and the important implications of carbon-free banking for an asset owner.

Speakers:

Ivan Friborg, Director, Impact Policy, Amalgamated Bank, and Confluence Board Member

Marilyn Waite, Climate Risk Program Officer, William and Flora Hewlett Foundation

10:45 AM

BREAK

11:00 AM

FlashTalk with Paul Dickinson, Executive Chair, COP North America

Welcome to Confluence Board Room C

PROFESSIONAL DEVELOPMENT SESSIONS

房间: 博隆迪

Small but Mighty: Outside, Bar American

Organized with Winthrop Rockefeller Foundation and Sapelo Foundation

Small foundations (less than $250 million in assets) serving predominantly rural and small urban areas recognize that investing in their communities looks different than in large cities. These areas are full of need: over 80% of persistent poverty counties are rural. But that’s not the whole story. Rich culture, tenacity, and a strong commitment to places permeates such locales. So, how do foundations do this work? Join us to explore how we are learning to work effectively within these communities. Come prepared to share your own struggles and victories, your expertise and burning questions, as we talk together about how to do this work in the places we call Home.

Speakers:

Andrea Dobson, Chief Operating & Financial Officer, Winthrop Rockefeller Foundation

Chistine Reeves Strigaro, Executive Director, Sapelo Foundation

Concurrent Interactive Sessions (Choose One)

As we celebrate our 10-year Anniversary, this is an opportunity to meaningfully engage with one another about the most pressing issues of our time. Interactive Sessions are intended to serve as a means to strategically utilize the expertise and partnership of those in attendance, and are designed as a small group discussion rather than formal presentation. Participants will collaborate with the facilitators and other attendees in a variety of interactive formats. These sessions will be for delegate attendees only in an effort to create a safe space to speak honestly and openly about the challenges and opportunities we face, all while fostering community among Confluence Members.

Evolving the ESG and Impact Conversation: What Must Change in How Allocators of Capital Make Decisions

Outside, Next to Smoothie Bar

Organized with Development Capital Strategies and Surdna Foundation

To date, existing ESG and impact metrics frameworks focus primarily on companies. However, practices at the fund manager level can undermine positive impacts at the portfolio level. To reduce systemic market and societal risks such as income inequality and climate change, asset owners need to take a holistic view of investment approaches. This means not only focusing on the portfolio companies to which they’re exposed, but also the ways these investments are structured and managed. For instance, high compensation for large alternative asset managers can exacerbate systemic wealth inequity. Funds and companies domiciled in tax havens can have negative development implications for the economies where they generate most of their profit. In private markets, deal structure can put significant risk onto workers and communities. This workshop aims to explore such issues in more depth. Discussion will also include whether there should be ESG and impact frameworks developed for asset manager structures, and if so, what next steps might look like.

Speakers:

Dellan Rotherenberg, Founder, Development Capital Strategies

Shaibu Siddiqui, Director, Impact Investing, Surdna Foundation

MEMBERSHIP LUNCH MEETING (MEMBERS ONLY)

Room: Ballroom A

In keeping with the call to respond to the Decisive Decade, Confluence will unveil a refreshed mission statement at this year’s Gathering. Join the Board of Directors to hear the call to action and find out about how you can support our new focus areas and share your ideas to influence emerging program strategies. Discussion will be led by Confluence Board Members Dan Chu and Stacey Faella.

Speakers:

Brent Kessel, Founder & CEO, Rockefeller Philanthropy Advisors

Johny Krey-Guyer, Trustee, Penney Family Fund

Sarah Malachowsky, Trustee and President, Penney Family Fund

Diana Trump, Trustee, Penney Family Fund and Confluence Board Member
It Takes an Ecosystem: Building a More Inclusive and Resilient Local Economy

Outside: Banyan Tree

Organized with Sunwealth Power

Forget about “It takes a village”—if we want to tackle big, audacious goals like reducing the racial wealth gap and building a more inclusive and resilient local economy, we need a whole ecosystem of players doing their part. From activists and incubators to organizers and influencers, to investors and implementers, we all have at least one role to play in driving change. Using Practitioners’ experiences as the background we discuss how organizations are working together to build a more regenerative economy. Leaves with a plan about how to identify and activate allies in your own community in radical new ways.

Speakers:
Jessica Brooks, Chief Development Officer, Sunwealth Power
Ivy Jack, Head of Equity Research, NorthStar Asset Management
Mark Watson, Managing Director, Fair Food Fund

Total Portfolio Activation, Now What?! Outside: Aquarelle on the Beach

Organized with Tiedemann Advisors and The Russell Family Foundation

If investing is a journey, not a destination, what happens after you’ve gone “all in”? This intimate and interactive session will bring asset owners together for a generative conversation about truly achieving a fully activated portfolio. How can this community continue to inspire, empower, and engage leading investors to remain at the forefront of this evolving field? Bringing together a small group of advisors and dedicated investors, we offer candid conversation aimed at overcoming potential fatigue and pursuing evolution in a rapidly growing field. To get the most out of this session, attendees are encouraged to actively participate in the discussion by sharing about their experiences, and challenge attitudes around full inclusion. How can investors and funders shape their communities in radical new ways?

Speakers:
Shawn Escott, Executive Director, Ray and Patricia Disney Family Foundation
Meridith Heinburger, Director of Impact, Global Endowment Management (GEM)
Rachel Robasciotti, Principal & Health Manager, Robasciotti and Philpott

Gender Lens and LGBTQ Investing: Two Lenses, One Vision Outside: Ballroom Terrace

Organized with Cornerstone Capital Group

Bias and discrimination toward LGBTQ people is, in part, related to gender and the normative expectations of gender. Recognizing the intersection between gender discrimination and LGBTQ equality results in a profound reorientation of how investors can approach companies and challenge attitudes around full inclusion. How can gender-lens investors take a more expansive view on gender and develop shareholder engagement strategies that are more inclusive, and in so doing, widen the aperture to include everyone, regardless of gender, sexual orientation, or gender identity?

Speakers:
Katherine Peese, Managing Director, Head of Impact Strategy, Cornerstone Capital Group
Heidi Vanni, Managing Director, Boston Trust Walden Company

Intentionality and Social Equity Investing Outside: Ballroom Terrace

Organized with Global Endowment Management

As more foundations invest with a Diversity, Equity, and Inclusion (DEI) lens, investors are eager to hear strategies and lessons learned from peers about what’s working, and not working, in this area. This session will convene a group of DEI practitioners who can share their lessons learned, hard-won experiences, and brainstorm best practices in group discussion.

Speakers:
Shawn Escott, Executive Director, Ray and Patricia Disney Family Foundation
Meredith Heinburger, Director of Impact, Global Endowment Management (GEM)
Rachel Robasciotti, Principal & Health Manager, Robasciotti and Philpott

Empowering Gatekeepers to Unlock Capital Outside: Banyan Tree

Organized with Bonwood Foundation

In this group discussion we will identify the barriers to values aligned movement of money with brainstorm and role play. There are no wrong answers! Next, we will imagine how we might lower those barriers to create a marketplace where asset owners readily participate as empowered investors. Then, stepping forward into pragmatic action, we will identify ways in which we can work with partners to bring this vision to life.

Speakers:
Catherine Burnett, Chief Impact Officer, Phillips Foundation
Matt Palsky, CEO, Tellem Asset Management
Eric Stephenson, Director of Client Service, Align Impact

Love and Resilience in the Decisive Decade

Organized with the Hip-Hop Caucus

Join us for a unique evening discussion that captures the spirit of revolution amidst growing global, grassroots movements for sustainability and justice. Whether Divest Black Lives Matter, #Metoo, or Fridays for the Future, social campaigns are often the first to shine a light on inequity or environmental abuse, raising awareness and calling on all others to join in demanding a meaningful response from the private and public sectors. Investors and philanthropists are uniquely positioned to bolster social, economic, and political movements by leveraging capital and influence to support transformative change. This special evening event will explore and honor the significant role that civil-society movements play in shaping the emergent environmental and economic narratives of this critical era. How can we support them?

OPENING REMARKS
Gabe Gonzales, Writer and Comedian

KEYNOTE
Luis Miranda Jr, Founding Partner, the MirRam Group, and Philanthropist

PANEL CONVERSATION
Luis Miranda Jr, Founding Partner, the MirRam Group, and Philanthropist
May Boeve, Executive Director, 350org
Gabe Gonzales, Writer and Comedian
Christine Neves, Co-founder and President, Emerge Puerto Rico
Rex Lesmes Yearwood Jr, President and CEO, Hip Hop Caucus

SPECIAL MESSAGE
Bill McKibben, Co-founder and Senior Advisor, 350.org

NETWORKING DINNER AND SALSA PARTY

FREE TIME
Optional Working Group Meetings & Workshops
Please see your program insert for side event information

GATHER FOR THE GALA
LOCATION: GOLD BALLROOM FOYER
Light Refreshments to be Served

EVENING PLENARY
8:00 PM: GOLD BALLROOM

END
**AGENDA**

**THURSDAY 2/27**

**BREAKFAST & REGISTRATION**
LOCATION: BALLROOM Foyer
Ad Hoc Discussions – Please see your program insert for ad hoc information

**SPECIAL BREAKFAST SESSION**
ROOM: PALMIERI I
Investing in the Future of Puerto Rico
Please join for a spirited early morning conversation about how to partner with local businesses and investment managers. This will be a discussion on both the grantmaking and investment sides of the balance sheet. Please feel free to bring your questions, ideas, and willingness to build connections!

**Speakers:**
- Ramphs Castro, Co-Founder and General Partner, Science/Start (Moderator)
- Karina Claudia Betancourt, Director, Open Society Foundations’ Puerto Rico Project
- Adrian Franco, Ph.D., Director of Program and Projects, Community Development Finance (CoDeFi), Federal Reserve Bank of New York

**ROOM: BALLROOM A**

**PLENARY SESSION**

**Leveraging Foundation Capital**
Organized with the John D. and Catherine T. MacArthur Foundation and Morgan Stanley

To achieve a just, equitable, and more sustainable future for all will require substantial private capital—most of which is located primarily in developed economies, while the need for that capital is centered in relatively low-returning assets (e.g., developed-market renewable energy) or high-risk jurisdictions (e.g., emerging and frontier economies). Blended finance approaches have been increasingly used to facilitate investments into both developed and emerging markets economies by reducing risks and/or enhancing returns for investors; however, more catalytic capital is needed to both unlock and scale up impact investments to the level needed. In this session, panelists will discuss potential ways to better coordinate the provision of catalytic capital from foundations, family offices, and development finance institutions with significant investments by relatively impact-agnostic asset owners in deal structures that advance a range of investor and stakeholder interests. Our goal is to help everyone find their role.

**Speakers:**
- Christine Bradford, Principal and Senior Investment Consultant, Meridian (Moderator)
- Adam Connaker, Principal, Innovative Finance, The Rockefeller Foundation
- Adrian Franco, Ph.D., Officer & Director of Community Development Finance (CoDeFi), Federal Reserve Bank of New York
- Lori Scott, Chief Credit Officer, The MacArthur Foundation

**ROOM: BALLROOM A**

**SPECIAL SESSIONS**

**Gender and Climate Intersect to Find Solutions at Companies**
As policymakers stall to respond to climate change, investors turn to markets for signals and solutions. At the vanguard of the companies moving the needle on climate change are women. Join us for spirited discussion between two industry leaders for an inside view about how companies are tackling climate solutions.

**Speakers:**
- Georgie Beranek, Co-Founder, Nadyne Cameron, President & CEO, Abtech Foundation

**ROOM: BALLROOM A**

**Leveraging Foundation Capital for a Just Transition**
Organized with Coastal Enterprises Inc. (CEI)

The benefits of climate action align with many investors’ focuses on rural and urban economies, environmental justice, and resilience of low-income communities. However, opportunities that align investor needs with viable solutions are few. In this session, we will review three local deals through the lens of a CDFI, a place-based foundation and international investment fund manager. Together we will examine how to leverage capital based upon fair transition principles. The session will highlight the value of place-based knowledge, technical assistance, and enabling policy in helping advance clean energy investment.

**Speakers:**
- Catherine Godzastahl, CEO, Building Impact Capital (Moderator)
- Dr. Nelson Colón, President, Puerto Rico Community Foundation
- John Egan, Chief Investment Officer, Coastal Enterprises Inc. (CEI)
- Justin Masson, Executive Director, Mary Reynolds Babcock Foundation

**ROOM: BALLROOM A**

**Eradicating Poverty by Working with Policy Makers**
Organized with Libra Foundation

The fact that virtually all of Puerto Rico has qualified as an Opportunity Zone (OZ) is a stark reminder of the persistent, omnipresent US contradiction of deep poverty amidst great wealth and resources. Does the OZ approach offer the desired balance of positive return for both investors and communities? What other examples of programs are there that facilitate investment in ways that promote sustainable and equitable economic development? This session will dive deeper into the evolving geography of poverty and into the ways that federal or local programs can further equitable economic development.

**Speakers:**
- Lisa Memoli, President & CEO, Opportunity Finance Network (Moderator)
- Jerry Martinson, Director of Cities and States, Ford Foundation
- David Sand, Chief Impact Strategist, Community Capital Management
- Morgan Simon, Managing Director, Candide Group, Libra Foundation

**ROOM: BALLROOM A**

**Building a Movement: Financial Activists**
Organized with Natural Investments, Tides, and Root Capital

The climate crisis is here, and rapidly implementing effective adaptation and resilience strategies is among the world’s most urgent challenges—especially for the most vulnerable populations who did little to cause this crisis, but now must face its consequences. Join us for a discussion to better understand what resilience means with the help of some frameworks, and to self-identify synergies in each of our work. We will have deep conversations around resilience in agriculture and energy systems, in addition to perspectives around capital access and policy environment.

**Speakers:**
- Peter Martin, Philanthropist, Director, Tides (Moderator)
- Michael Kramer, Managing Partner, Natural Investments
- Arturo Massol-Deyá, Founder, Casa Pueblo
- Amy Mullin, Chief Development Officer, Root Capital

**ROOM: BALLROOM A**

**Shades of Grey: Investing for a Paradigm Shift**
Organized with Nia Community Foundation

At the impact investing space groves and moves mainstream, how can we ensure we are having the desired effects? This session features Confluence members that have moved the financial system by investing in diverse teams that direct money to entrepreneurs, and to segments of our economy that have previously been neglected by the current economic system. We will discuss ways to evaluate potential investments with a social justice lens that prioritizes paradigm. Our speakers will share stories, techniques, and examples of investments that have shifted the investment landscape in big and small ways. This session will offer unique viewpoints and illustrate varying types of investments among asset classes that redirect the economic outcomes toward inclusion and sustainability.

**Speakers:**
- Kribin Hu, Founder, Nia Community Foundation
- Tracy Gray, Trustee, California State University Dominguez Hills Foundation
- Jim Coughlin, Program Manager, Confluence Philanthropy

**ROOM: BALLROOM A**

**Resilience is the New Sustainability**
Organized with Natural Investments, Tides, and Root Capital

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- Arturo Massol-Deyá, Founder, Casa Pueblo
- Amy Mullin, Chief Development Officer, Root Capital
Investing in Island Entrepreneurship

The last decade has seen the emergence of new vision and commitment to local economic development. The Puerto Rico Science, Technology and Research Trust, a small business incubator and accelerator in Santurce, houses an intensive training program and venture fund for high-impact start-ups. Also offered is a local pre-acceleration program focused on helping early-stage Puerto Rican startups that have global potential, to get to market. Field trip participants will hear from entrepreneurs and key partners nurturing investment innovation. The trip will be flexibly structured to enable those who wish to remain after the first half to further engage, while others will be able to depart and walk to La Placita, the 100-year old market that anchors food and nightlife—where we will host the trip’s final half hour debrief.

Tour Leaders:
Richard Burgos, Consultant, Puerto Rico Science, Technology and Research Trust
Marie Custodio, Outreach Manager, Partner 16

Investing in a Just Transition in Puerto Rico: An Estuary Exploration by Boat

Join practitioners in a shared learning opportunity to explore local solutions to resilience among communities in the environmentally degraded Caño Martín Peña neighborhood, a 3.5-mile long natural tidal channel that is part of the San Juan Bay Estuary. The region is the only tropical estuary within the EPA’s National Estuary Program, and was among the most affected regions during Hurricanes Irma and Maria. The trip, in partnership with Proyecto ENLACE, a prominent non-profit, and Excursiones ECO, a community micro-enterprise committed to the restoration of Caño Martín Peña and San Juan Bay Estuary, will include a boat trip through the estuary to discuss the area history, followed by a bus tour that explores various neighborhood interventions.

Tour Leaders:
Matita Ayala, Co-founder, Excursiones ECO
Marie Núñez Mercado, Executive Director, Corporación del Proyecto ENLACE
Lucy Cruz Rivera, President, G-8

Estrella D. Santiago Pérez, J.D., Environmental Affairs Manager, Corporación del Proyecto ENLACE
Dan Chu, Executive Director, Sierra Club Foundation

Exploring the Investable Landscape:
Hike El Yunque National Forest

The IPCC report “Climate Change & Land,” released in August 2019, emphasized the critical role of land management to curtail the impending climate crises. This report was a call to action for investors to mobilize capital towards land based climate solutions. With the world’s forests at the heart of those solutions, this field trip will take attendees on a hiking tour through trails of 28,000 acre El Yunque National Forest, the only tropical rain forest in the US. The trip will be led by a local tour guide, with expert investor insights from Ecotrust Forest Management.

Tour Leaders:
Bettina von Hagen, Co-Founder, CEO & Managing Director, Ecotrust Forest Management (BVI)
Dr. Tamara Hartwell Scales, Research Ecologist, International Institute of Tropical Forestry
Jorge A. Montalvo, Professional Tour Guide Founder, Patria Tours

How a Disaster Seeded a Local Food Movement
Organized with the Ocean Foundation

Hurricanes Irma and Maria destroyed an estimated 80% of Puerto Rico’s crops and farmland. However, Puerto Rico has continued to develop its food economy, increasing the amount of locally grown food on the island. How are these after effects a model for ecological resilience, sustainability, and community empowerment? This field trip will feature local producers with a unique story to offer investors, relevant to Puerto Rico and beyond. Conservación Con Ciencia will guide our visit to the Naguabo Fishing Cooperative, a commercial fishing cooperative that has made fishing more sustainable from the catch to consumption. Participants will gain a comprehensive view of the strengths and challenges for local fishermen and residents more than two years after the natural disasters.

Tour Leaders:
Jason Donofrio, External Relations Officer, Ocean Foundation
Isabel Rubín, Co-Founder and Executive Director, ConCiencia
GEORGIE BENARDETE
Georgie Benardete is the Co-Founder and CEO of Align17, a private digital marketplace that makes it easier for professional investors to identify and invest in impact funds and direct impact investments. Align17 was founded in partnership with UBS Private Wealth, as part of their efforts to mobilize Private Wealth into achieving the UN Sustainable Development Goals. A Young Global Leader with the World Economic Forum, Georgie’s career spans experiences at JP Morgan Latin America BofA, the Overseas Private Investment Corporation, and Coopers & Lybrand in US and Argentina. She is Chairwoman of the Fourth Sector Group, and Board Emeritus of the Global Entrepreneurs Council of Ted Turner’s United Nations Foundation. Benardete co-Founded Yesilist.com, Turkey’s largest green portal, and is part of Al Gore’s Climate Project. Georgie is a member of the Fast Company Impact Council, and sits on the Investment Committee of Bele Capital, an early stage VC fund that promotes investments in companies with strong female leadership. She was part of the Advisory Board of the WEFi’s Young Global Leaders, and is a Founding Curator of the WEFi Global Shapers Hubs in San Juan and New York City. She is a Woodrow Wilson Fellow and received her Masters in Science of Foreign Service, with honors, from Georgetown University.

MAY BOEVE
May Boeve is the Executive Director of 350.org, an international climate change campaign. 350.org’s creative communications, organizing, and mass mobilizations strive to generate the sense of urgency required to tackle the climate crisis. Previously, May co-founded and helped lead the Step It Up 2007 campaign, and prior to that was active in the campus climate movement while a student at Middlebury College. May is the co-author of Fight Global Warming Now. She lives in the Bay Area.

LYNELLE CAMERON
Lynelle Cameron is the CEO of Autodesk Foundation. She has over 20 years of experience helping large and small companies capitalize on market opportunities related to sustainability and climate change. Her career reflects a demonstrated track record leading large scale transformative work spanning the nonprofit, public and private sectors. Cameron is currently Vice President of Sustainability at Autodesk and CEO of the Autodesk Foundation. She leads a team transforming the design, manufacturing and construction industries to capitalize on the business opportunities of a low-carbon economy. Lynelle was recently recognized as one of the Most Influential Women in Business by the SBRT and is a recipient of the HVAC’s Tribute to Women Awards. She has an MBA from UC Berkeley, MS from U of Michigan, and a BA from Middlebury College.

PAUL DICKINSON
Paul Dickinson founded CDP in 2000 with an ambition of creating a global economic system that operates within sustainable environmental boundaries and prevents dangerous climate change. CDP represents over 650 investors with assets of over $97 trillion, and it uses this authority combined with the buying power of over 115 large corporations with annual revenue of over $3 trillion, to persuade over 6,400 large companies to report on their greenhouse gas emissions as well as strategy on climate change, water use and the drivers of deforestation. In addition, over 700 large cities and 100 states and regions with aggregate over 1 billion inhabitants report annually on their environmental performance through CDP, which is a charitable organization operating in 80 countries from nine offices around the world. Paul is Chair of the Trustees of the NGO ShareAction as well as a Trustee of the Findhorn Foundation in Scotland. He is an advisor to the NGO Influence Map and is a trustee of the grant making Friends Provident Foundation. He is a co-presenter of the podcast ‘Outrage and Optimism’ with Christiana Figueres and Tom Carmack.

JED EMERSON
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MY JOB IS TO MAKE LIFE BETTER FOR PEOPLE, AND YOU CANNOT MAKE LIFE BETTER IF YOU ARE IN A HELICOPTER. YOU CAN'T MAKE LIFE BETTER FOR THEM IF YOU CAN'T TOUCH THEM.

— CARMEN YULIN CRUZ, MAYOR OF SAN JUAN

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Co Head of Endowments & Foundations Business
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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 10th 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.

ACKNOWLEDGMENTS

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- WILLIAM CASPAR GRAUSTEIN MEMORIAL FUND

SPECIAL ACKNOWLEDGEMENTS
- RAMPHIS CASTRO
- LUIS MIRANDA, SARA ELISA MILLER, AND VANESSA REYES
- ISABEL RULLÁN

I don’t want to dream anymore, I want my life to be real!
RICKY MARTIN

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Impact Investing Handbook
COMING SOON
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The new mission of Confluence Philanthropy is to transform the practice of investing by aligning capital with our community values of sustainability, equity, and justice.

We support and catalyze a membership network of private, public and community foundations; family offices; individual donors; and their values-aligned investment advisors representing more than $70 billion in philanthropic assets under management, and over $3.5 trillion in managed capital. Members are committed to full portfolio activation when prudent and feasible.

Based in the United States, Europe, Latin America, and Canada, our members invest around the world. Members represent a diversity of institutions, charitable asset types, and programmatic missions, and while they play various personal and professional roles, we all share a commitment to values-aligned capital management.

Confluence translates learning and connection into concrete action through our annual conferences, webinars, and trainings. We organize working groups that focus on specific investment themes including climate solutions, racial equity, investing in partnership with Native American communities, and active ownership.

All investments have an impact. We promote value alignment across asset classes, investment vehicles, and advocacy strategies. This includes cash, proxy voting, shareholder engagement, program-related investing, screening public equities, and private equity. We believe that investors should not compromise what matters to them in exchange for financial return. By aligning capital in all its forms with our values, we can build an economy that is sustainable and that takes care of people and the planet, together.
WORKING GROUPS

ACTIVE OWNERS INITIATIVE
The Active Owners Initiative 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 a 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 Initiative creates a community of practice for bringing “dark money” to light.

CLIMATE SOLUTIONS COLLABORATIVE (C2C)
The Climate Solutions Collaborative (C2C) is a working group for pioneering philanthropies, investment managers, and family offices dedicated to halting climate change. Collaborative members accelerate the flows of capital to foster mitigation, low-carbon transition, and resilience. C2C is committed to making investments that measurably reduce emissions and works to deploy private and philanthropic capital towards a sustainable economy. C2C aims to bring market-based climate solutions to scale and to make the field of climate investing more active, connected, and effective. The Climate Solutions Collaborative was created in 2016 in partnership with The U.S. Department of Energy and policymakers under President Obama.

DIVERSITY EQUITY AND INCLUSION INITIATIVE
With women and people of color managing little more than 1% of the world’s $72 trillion of assets under management, Confluence’s Diversity, Equity and Inclusion Initiative is working to expand the control and deployment of capital beyond the historical white male gatekeepers. Our annual Practitioners Gathering features a very robust DEI (Diversity, Equity and Inclusion) track with relevant topics as well as dynamic women and people of color. Additionally, Confluence continues its Women’s Leadership Dinners around the country, and our Racial Equity Initiative produces compelling thought leadership and resources to move the industry discussion forward. This year we are convening industry leaders to develop a viable theory of change and strategy for advancing the field.

RAINMAKERS INVESTMENT COLLABORATIVE (RIC)
The Rainmakers Investment Collaborative (RIC) is a coordinated group of program-related investors (PRI) focused in New Mexico and Arizona. Developed to address the dearth of investment in Native American communities, RIC underwrites investments in affordable housing, sustainability projects, locally-owned businesses, and tribal enterprises across the Southwest. RIC is partnered with RCAC — a community development financial institution with a long lending history and expertise in rural areas — as the intermediary partner after a competitive selection process. The Collaborative aims to raise a total of $4 million in PRI investments by 2021.

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.
"I BELIEVE IN LOVE."

—JENNIFER LOPEZ