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

- **7:30 AM**
  - Conference Registration Opens

- **8:30 AM**
  - Local Excursions

- **9:00 AM**
  - Welcome Intensive (Investor only)

- **10:00 AM**
  - Kellogg Event (By Invite only)

- **10:45 AM**
  - Break

- **12:00 PM**
  - Learners & Practitioners Lunch

- **1:00 PM**
  - Learners Institute (Consecutive sessions)

- **2:00 PM**
  - Break

- **3:30 PM**
  - Free Time

- **4:00 PM**
  - Break

- **5:15 PM**
  - Break

- **6:00 PM**
  - Gratitude Dinner (By invite only)

- **6:30 PM**
  - Welcome Reception and Dinner

- **7:30 PM**
  - Gala Networking Dinner and Salsa Party

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### WEDNESDAY, FEBRUARY 26

- **7:30 AM**
  - Breakfast and Registration

- **8:00 AM**
  - Active Owners Working Group Breakfast

- **8:00 AM**
  - Racial Equity Breakfast

- **9:10 AM**
  - Welcome

- **9:30 AM**
  - Plenary Session

- **10:00 AM**
  - Keynote

- **10:40 AM**
  - Break

- **10:45 AM**
  - Break

- **11:00 AM**
  - Flash Talk

- **11:15 AM**
  - Community Reflections

- **12:00 PM**
  - Lunch

- **1:00 PM**
  - Membership Meeting (Members Only)

- **2:00 PM**
  - Break

- **2:15 PM**
  - Concurrent Interactive Sessions

- **3:30 PM**
  - Free Time

- **5:30 PM**
  - Gather for the Evening Plenary and Gala

- **7:30 PM**
  - Gala Networking Dinner and Salsa Party

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### THURSDAY, FEBRUARY 27

- **7:30 AM**
  - Investing in the Future of Puerto Rico - Special Breakfast Session

- **8:45 AM**
  - Morning Welcome

- **9:00 AM**
  - Plenary Session

- **10:00 AM**
  - Keynote

- **10:40 AM**
  - Break

- **10:55 AM**
  - Concurrent Interactive Sessions

- **12:10 PM**
  - Lunch for Those Not Attending Field Trips or Workshop (Prior Registration Required)

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**AGENDA OVERVIEW**

**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 legacies 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.

CONTACTS

CONFLUENCE PHILANTHROPY
Rick Fowler, Event Manager: 1 (202) 321-0302
Lynn Shipman, Onsite Coordinator: 1 (415) 717-6370

www.confluencephilanthropy.org

EL SAN JUAN HOTEL
Tel: 1 (787) 791-1000
Toll Free Number: 1 (800) 819-7155
Email: esjinfo@fairmont.com
HOTEL

GETTING TO THE HOTEL & CONFERENCE SITE

EL SAN JUAN HOTEL
00903 Isla Verde Avenue Carolina
Puerto Rico 00979

TAXI
El San Juan Hotel is a short five minutes from the San Juan Luis Muñoz Marin 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 headliners 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 check-out 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 rate plus tax based on that evening’s rate. The minimum age to register is 21.

**Resort Charge**

The hotel reserves the right of admission. While there are no age restrictions at El San Juan, we appreciate your support of this chic and elegant standard. upscale elegance. For the comfort of you and those around you, no lids allowed. In the evening, our atmosphere transforms into 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. The hotel reserves the right of admission.

**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. The hotel reserves the right of admission.

**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 service is available. 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, 5:30 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.

**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 reframe local flavors with a modern palette, Aquarelle will become a renewed San Juan favorite for beachfront dining. 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

**LOGISTICS**

**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

**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 exercise, 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

**LOGISTICS**

Scan the QR code to the right with your phone’s QR scanner
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.

M cree m mee ng
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

CONNECT WITH THE COMMUNITY ON SOCIAL MEDIA!

@ConfluenceP
www.facebook.com/Confluencephilanthropy
www.linkedin.com/company/confluence-philanthropy
#ownwhatyouown
AGENDA
TUESDAY 2/25

CONFERENCE REGISTRATION OPENS
LOCATION: BALLROOM FOYER

LOCAL EXCURSIONS
ALL EXCEPT WELCOMES WELCOME DEPART FROM HOTEL MAIN ENTRANCE

Wellness Welcome: Relax with yoga and poolside networking to follow
LOCATION: BANYAN TREE & SWIMMING POOL

Enjoy this all level Vinyasa Flow workout that will take you through a variety of poses to help you open your mind, body and spirit for the Gathering. Elements of balance, core strengthening, muscular flexibility and mental acuity are combined with kien focus on the breath and breathing techniques. The Yoga class is followed by a casual networking reception poolside.

Seeking San Juan: A Walking Tour of Old San Juan’s Waterfront, with Maria Jobin-Leeds, Board Chair, Access Strategies Fund and local guides
Join a small group of fellow urban explorers for a 2.5 hour guided walking tour of Old San Juan. This 465-year-old neighborhood has often been revered as a military stronghold to fend off invaders. We will visit fascinating historical sites such as El Morro Grounds, Cuartel de Ballaja, Casa Blanca Gardens, Casa Blanca, Caleta de Las Monjas, La Rogativa and El Convento Hotel. Easy snacks can be found along the way!

Paddle Boarding with Jason Scott, Board Member, Encourage Capital
Hop out to the water before the conference rooms? Jump on the paddleboard adventure at nearby Condado Lagoon Natural Reserve. What’s included? Transportation to the Lagoon, equipment, and a basic class for beginners provided by an instructor. Experienced paddlers can take off on their own! Time on the water = 1.5 hours.

WELCOME INTENSIVE
ROOM: BENNETT I & II

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 duties, 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 Kroll, Sustainable Investing Analyst, Brown Advisory
- Tom Mitchell, Managing Director, Cambridge Associates

Speaker:
- Adam Cummings, Trustee, The Nathan Cummings Foundation

WELCOME INTENSIVE COHORT LUNCH
ROOM: BENNETT I & II

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 hopes and, in other ways, not quite as much as we’d hoped. This afternoon session brings together some of the individuals and organizations 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, Chief Catalyst, Catalyz at Large, and Co-Founder, CatalystSmart 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 Godske, Giddeke Consulting and Confluence Co-Founder Member (Moderator)
- Regan Pritzker, Board Member, Lilac Foundation

Speaker:
- Ray Ramsay, Independent Trustee, Member of the Investment Committee and Interim CEO, Nathan Cummings Foundation

Break

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

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

Reflections and Group Discussion with Investment Advisors
Speakers:
- Matthew Weatherly-White, Managing Director, Capeck (Moderator)
- Patricia Ferrer-Rivas, CEO, Meta Wealth Partners
- Raúl Pomeres, Founder & Managing Director, Soren Capital
- Jeff Schner, Managing Director, Pathfinder
- Jason Scott, Board Member, Encourage Capital

Lunch Break

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 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:
- Lisa Michaux, Chief of Staff and Director of ESG/SRI, Aperio Group (Moderator)
- Cara Earl, Assistant Vice President, Breonbridge
- Tamara Larsen, Executive Director, Agipl SLP

Break

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

LEARNERS INSTITUTE
ROOM: BENNETT I & II

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 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:
- Lisa Michaux, Chief of Staff and Director of ESG/SRI, Aperio Group (Moderator)
- Cara Earl, Assistant Vice President, Breonbridge
- Tamara Larsen, Executive Director, Agipl SLP

Break

REFLECT AND PROTECT
ROOM: BALLROOM C

Creating a Healthy Decision-Making Culture
Organized with Zevin Asset Management
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 decades, 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 Counsel (Moderator)
- Susan Dornay, VP for Finance and Administration, Gates Family Foundation
- Kristi Patrie, Executive Director, A.J. Foundation
- Bill Reppinger, CFO, General Service Foundation

Break

Practicum for Public Equities
Organized with Zevin Asset Management
Whether the issue is climate change, poor labor standards, or racial equity, the 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 would 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 toward 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:
- Sonia Kewai, President, Zevin Asset Management (Moderator)
- Tim Dunn, Chief Investment Officer and Founder, Terra Alpha Investments LLC
- Lisa Heyes, Vice President of Institutional Investment Services, Boston Common Asset Management

Break

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

Registered Delegates & Invited Guests Only
Party Theme: Circular Economy: Thrift Your Island-Wear
Attendees are encouraged to engage in the circular economy and wear their most fun thrifty or repurposed island wear. The more creative and colorful the better!
AGENDA
WEDNESDAY 2/26

BREAKFAST & REGISTRATION
ROOM: BALLROOM A
8:00 AM - 9:00 AM
Ad Hoc Discussions – Please visit the program guide insert for ad hoc descriptions and locations

SPECIAL BREAKFAST SESSIONS

Active Owners Breakfast - Secrets in the Islands: Predatory Money in the Caribbean (ROOM: PALMIERI I)
Organized with The Ocean Foundation and the Active Owners Steering Committee
Predatory money is hidden in offshore accounts across the Caribbean. Among these types of holdings, hedge funds count foundations, endowments, foreign governments, and central banks as part of their clientele. Perhaps unwitting to investors, some have speculated in Puerto Rico’s debt and forced policy changes in their financial far. As a result, the return on these investments is uncertain. This panel will explore these dangerous and complex strategies and what investors can do to protect their values and bring dark money to light.

Speakers:
Mark Spalding, President, Ocean Foundation and Confluence Board Chair (moderator)
Myrna Rivera, Founder and Chief Executive Officer, Consultiva International Inc. (“Consultiva”)
Edward Tillinghast, Board Member, Ocean Foundation

Racial Equity Breakfast (ROOM: BALLROOM B)
Organized with California Wellness Foundation
What are the challenges and opportunities for advancing racial equity in the investment industry? After a brief overview about Confluence’s Racial Equity Initiative, participants will hear from leaders in the field about their vision for implementing racial equity strategies. Organizational leadership will discuss the unique role that Confluence is advancing in this work. Provocative questions will be posed to attendees and brief Q&A will close out the session, with the hope of building energy and momentum for this important work throughout the gathering and the field.

Speakers:
Fatima Angeles, Vice President of Programs, California Wellness Foundation (moderator)
Cynthia Mullo, Director of Mission Investment, WWF
Miltiadis “Mitty” Ownes, Program Director, Confluence Philanthropy

CONCURRENT INTERACTIVE SESSIONS (CHOOSE ONE)

AGENDA
WEDNESDAY 2/26

WELCOME
ROOM: BALLROOM A
9:30 AM
Mark Spalding, President, The Ocean Foundation and Chair, Confluence Board of Directors
Dr. Nelson Colón, President, Puerto Rico Community Foundation

PLENARY 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 is a function of system failures. Poor political leadership, the economy, corporate governance, high personal debt, race relations, international trade, and uncontrollable weather events... Where? Sometimes we fixate upon parts of the system and miss the whole. How can 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 challenges that we grapple with. Crisis is a both challenge and an opportunity. How can we steer toward goal like justice, equity, and a stable climate amidst all this complexity?

Flash talk by Dr. Elizabeth Sawin, Co-Founder and Co-Director, Climate Interactive
Panel Speakers:
Santhosh Ramdoss, Principal, Seed Foundation (Moderator)
Rachel Payne, Managing Director, FullCycle, and Founder, The Tree Pledge
Dr. Elizabeth Sawin, Co-Founder and Co-Director, Climate Interactive
Erica Barbosa Vergas, Director of Solutions Finance, McConnell Foundation

BREAK
9:45 AM - 10:00 AM

FLASH TALK WITH PAUL DICKSON, EXECUTIVE CHAIR, CPD NORTH AMERICA
ROOM: BALLROOM A
10:00 AM - 10:15 AM

COMMUNITY REFLECTIONS
Join us for Confluence Member Reflections on the field in an open-forum sharing session led by David Estrada, Confluence Managing Director, Dana Laranja, Confluence CEO, and Mark Spalding, Confluence Board Chair

LUNCH
LOCATION: BALLROOM TERRACE
10:15 AM - 11:00 AM

MEMBERSHIP LUNCH MEETING (MEMBERS ONLY) ROOM: BALLOON 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 to learn 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 Failla.

Speakers:
Fatiha Ghazi, President of ProFuturo, California Wellness Foundation (Moderator)
Cynthia Mullo, Director of Mission Investment, WWF
Miltiadis “Mitty” Ownes, Program Director, Confluence Philanthropy

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.

Decarbonizing Financial Lending
ROOM: BALLROOM C
Organized with William and Flora Hewlett Foundation and Amalgamated Bank
In order to avoid a temperature rise above 2° before 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 toward 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 Frishberg, Director, Impact Policy, Amalgamated Bank
Marilyn Wais, Climate Finance Program Officer, William and Flora Hewlett Foundation

Small but Mighty
Outside: Bar Americana
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 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 work in rural places? Join us to explore how we are learning to work effectively in 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
Christine Reaves Strigaro, Executive Director, Sapelo Foundation

Money Psychology + Family Philanthropy
Outside: Next to Smoothie Bar
Organized with Penney Family Fund and Roxus Wealth Partners
Join members of the Penney Family Fund and impact advisor & author Brent Kessel for a real-world case study of how our biases and beliefs around wealth, giving, saving, and investing influence our effectiveness and communications. Using the framework of Brent’s recent financial archetypes, participants will learn what their dominant financial tendencies are, where they most influence their actions, and how to cultivate a more aligned impact strategy with a spouse, family members or organizational colleagues. This session will be highly interactive, including the Penney family sharing how they have responded to this in the past, exercises (bring your phone or tablet), and Q&A with audience members.

Speakers:
Brent Kessel, Founder & CEO, Roxus Wealth Partners
Jordan Kern-Guyer, Trustee, Penney Family Fund
Sarah Malachowsky, Trustee and President, Penney Family Fund
Diana Trump, Trustee, Penney Family Fund and Confluence Board Member

What Must Change in How Allocators of Capital Make Decisions
Outside: Signature Restaurant
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 inequality. 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 push significant risk onto workers and communities. This workshop aims to explore such issues in more depth. Discussion will also include whether such tools of ESG and impact frameworks developed for asset manager structures, and if so, what next steps might look like.

Speakers:
Debden Rothernberg, Founder, Development Capital Strategies
Shaish Sididji, Director, Impact Investing, Surdna Foundation

MORE CONCURRENT INTERACTIVE SESSIONS ON PAGE 18
WWW.CONFLUENCEPHILANTHROPY.ORG

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WWW.CONFLUENCEPHILANTHROPY.ORG

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Gender Lens and LGBTQ Investing: Two Lenses, One Vision

OUTSIDE: BALLROOM TERRACE

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 Pease, 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-earned experiences, and brainstorm best practices in group discussion.

Speakers:
Shawn Escobedo, Executive Director, Roy and Patricia Disney Family Foundation
Meredith Heimburger, Director of Impact, Global Endowment Management (GEM)
Rachel Robasciotti, Principal & Head of Engaging Issues, Robasciotti and Philko

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 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 Patsky, CEO, Tellem Asset Management
Eric Stephenson, Director of Client Service, Align Impact

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

Gender Lens and LGBTQ Investing: Two Lenses, One Vision

OUTSIDE: BALLROOM TERRACE

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 Pease, 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

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AGENDA
Thursday 2/27

7:30 AM

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

SPECIAL BREAKFAST SESSION
ROOM: PALMIERI

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:

Rampish Castro, Co-Founder and General Partner, ScienceVest (Moderator)
Karina Claudio Betancourt, Director, Open Society Foundations Puerto Rico Project
Luis Alberto Ferné Rangel, Chief Social Innovation Officer, ScienceVest (Co-Developer)

8:45 AM

PLENARY SESSION
ROOM: BALLROOM A

Leveraging Foundation Capital
Organized with the John D. and Catherine T. MacArthur Foundation and Meric

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, Mercer (Moderator)
Adrian Connaker, Principal, Rockefeller Foundation
Lori Scott, Chief Credit Officer, The MacArthur Foundation

9:00 AM

CONCURRENT TRADITIONAL SESSIONS (CHOOSE ONE)
ROOM: PALMIERI

Tales from the Fire Place-Based Climate Investing for a Just Transition

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 Gadzicki, CEO of President of Investments, Calvert Impact Capital (Moderator)
John Egan, Chief Investment Officer, Coastal Enterprise Inc (CEI)
Dr. Nelson Colon, President, Puerto Rico Community Foundation
Justin Masson, Executive Director, Mary Reynolds Balbrock Foundation

ROOM: ANKA

Resilience is the New Sustainability
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, Philanthropic Director, Tides (Moderator)
Michael Kramer, Managing Partner, Natural Investments
Arturo Massoli-Doisy, Founder, Casa Pueblo
Amy Mullins, Chief Development Officer, Root Capital

Building a Movement: Financial Activists Leveraging Capital to Effect Real Change
ROOM: BENNETT I

Organized with RSF Social Finance

To move the needle forward on issues including racial justice, climate change, and our challenged economic system, the world needs financial activists willing to think about capital—resources that are both financial and human—in bold, complex, and creative ways. Learn what it’s going to take in discussion between visionary financial leaders who are effecting real change.

Speakers:

Donna Daniels, Director, Client Engagement, RSF Social Finance (Moderator)
Nina Robinson, Director, The Funded Project, Oakland Community Foundation
Tony DiLeta Hoppa, Managing Partners, Distel & Partners

ROOM: PALMIERI

Shades of Grey: Investing for a Paradigm Shift

Organized with Nis Community Foundation

As the impact investing space grows 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 pivots paradigms. Our speakers will share stories, techniques, and examples of investments that have shifted the borrowing 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:

Krishna Hall, Founder, Nis Community Foundation (Moderator)
Tracy Gray, Trustee, California State University Delta-Mendota (Moderator)
Jim Chaudey, Program Manager, Confluence Philanthropy

9:00 AM

SPECIAL BREAKFAST SESSION
ROOM: BALLROOM A

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:

Michelle Bernardo, Co-Founder, Lynelle Cameron, President & CEO, Asheville Foundation

ROOM: PALMIERI

ERODATING POVERTY BY WORKING WITH POLICY

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 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 Mersueh, President & CEO, Opportunity Finance Network (Moderator)
Jerri Maldonado, Director of Cities and States, Ford Foundation
David Sand, Chief Impact Strategist, Community Capital Management
Morgan Simon, Managing Director, Candela Group, Libra Foundation

10:00 AM

BREAK

ROOM: ANKA

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Speakers:

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10:15 AM

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ROOM: BALLROOM A

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AGENDA

THURSDAY 2/27

12:00 PM
LUNCH FOR THOSE NOT ATTENDING FIELDTRIPS
LOCATION: BALLROOM & TERRACE

12:30 PM
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 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 Excusiones 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:
- Malúa Ayala, Co-Founder, Excusiones ECO
- Estrella D. Santiago Pérez, J.D., Environmental Affairs Manager, Corporación del Proyecto ENLACE
- Dan Chu, Executive Director, Sierra Club Foundation

12:10 PM
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 flexible 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 host the trip’s final half hour debrief.

Tour Leaders:
- Ricardo Burgos, Consultant, Puerto Rico Science, Technology and Research Trust
- Marie Custodio, Outreach Manager, Parallel 18
- Andreica Maldonado, Grants Program Director, Puerto Rico Science, Technology and Research Trust

3:00 PM
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:
- Betina von Hagen, Co-Founder, CEO & Managing Director, Ecotrust Forest Management
- Dr. Tamara Heartlnd Saldana, Research Ecologist, International Institute of Tropical Forestry
- Jorge A. Montalvo, Professional Tour Guide Founder, Patria Tours

FIELD TRIPS (PRIOR REGISTRATION REQUIRED)
ALL EXCEPT WORKSHOP DEPART FROM HOTEL MAIN ENTRANCE
Choose from four off-site field trips at Conference registration. Field trips will conclude at 5pm, returning to the hotel around 6pm. Lunch will be provided during the field trip. Dinner is not included in registration. Note that the Decolonizing Wealth Workshop is on site and begins at 12:30pm with a private lunch.

Decolonizing Wealth: How to Use Money as Medicine: A Special Workshop with author, Edgar Villanueva

This workshop will be held at the El San Juan Hotel and begins at 12:30pm

Decolonizing Wealth Workshop: You loved the best-selling book, now you can join award-winning author Edgar Villanueva for the premier of his Decolonizing Wealth workshop in Puerto Rico! In this post-conference afternoon intensive, you will learn more about the concept of colonization and how this dynamic may show up in your work. During this session we will craft personal commitments to building processes for healing by changing the ways in which we partner with disadvantaged communities. You will leave inspired to integrate the ‘Seven Steps to Healing’ into your own leadership style, with concrete ideas about how you can motivate others to be stronger allies and partners to those we long to serve.

Workshop Trainers:
- Edgar Villanueva, Bestselling Author, Decolonizing Wealth
- Vanessa Roanhorse, CEO, Roanhorse Consulting

Investing in Island Entrepreneurship

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Exploring the Investable Landscape: Hike El Yunque National Forest

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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 ConCiencia 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, Co-Founder and Executive Director, Conservación ConCiencia
- Isabel Rubión, Co-Founder and Executive Director, ConsPrmetidos
- Raimundo Espinoza, External Relations Officer, Proyecto ENLACE
- Estralla D. Santiago Pérez, Co-Founder, Conservación ConCiencia

How an Estuary Exploration by Boat

Investing in Island Entrepreneurship

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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 experience at JP Morgan Latin America B, the Overseas Private Investment Corporation, and Cooper’s 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 Yeslist.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 Belle Capital, an early stage VC fund that promotes investments in companies with strong female leadership. She was part of the Advisory Board of the WEF’s Young Global Leaders, and is a Founding Curator of the WEF’s 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.

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 SBFT and is a recipient of the YWCA’s Tribute to Women Awards. She has an MBA from UC Berkeley, MS from U of Michigan, and a BA from Middlebury College.

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-founder of Fight Global Warming Now. She lives in the Bay Area.

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 purchases of over $3.5 trillion, to persuade over 4,000 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 Carnic. Paul is a frequent speaker at conferences and events. The City of London and the City of London Financial Services Community have awarded Paul LifeTime appointments for his work on Climate Change and Corporate Responsibility. He is a member of the Club of Rome and a fellow of the Royal Society of Arts, and a member of the World Economic Forum’s Network of Global Shapers. Paul is an advisor to the board of The Climate Group, and a member of the Advisory Board of the New Climate Institute. Furthermore, Paul is part of the advisory board of the Fan of Change Foundation.

JED EMERSON

Jed Emerson is the originator of the concept of Blended Value and Total Portfolio Management. He has extensive experience leading, staffing and advising funds, firms, social ventures and foundations pursuing financial performance with social/ environmental impact. In addition to his writing, Jed currently focuses on working with families exploring how to ensure a long-term legacy by managing their full net worth for impact. He is an internationally recognized thought leader in impact investing, social entrepreneurship and strategic philanthropy. Emerson has twice been selected as one of North America’s Top 100 Thought Leaders in Trustworthy Business Behavior and was awarded a LifeTime appointment in 2015. Together with co-author, Antony Bugg-Levine, winner of the 2012 Nautilus Gold Book Award and has twice been selected by the NonProfit Times as one of the 50 Most Influential People in the Sector.

LUIS MIRANDA

Luis A. Miranda Jr. is Founding Partner of The MirRam Group, a government affairs, lobbying and political consulting firm in New York City. He has previously served in three New York City mayoral administrations. Mr. Miranda is the Founding President of the Hispanic Federation and past chairman of the NYC Health and Hospitals Corporation. He is board chair of the Latino Victory Fund and the Northern Manhattan Arts Alliance. He is a board member of The Public Theater, The Glider Lehman Institute of American History, NYC & Company, and the nonprofit The City. Mr. Miranda chairs the advisory boards to Broadway League’s Viva Broadway, and the Caribbean and Latin American Studies Department at the CUNY Graduate Center. He and his family have supported the relief efforts in Puerto Rico following the destruction of Hurricane Maria in September 2017. They have actively fundraised for the Hispanic Federation’s UNDOCS for Puerto Rico program, raising over $4.5M to date for community organizations throughout the island. In honor of HAMILTON’s historic run in Puerto Rico in 2019, the Miranda family, the producers of HAMILTON, and the Flamboyan Arts Foundation have partnered to create the Flamboyan Arts Fund, with the goal of raising $15 million dollars for arts and culture on the island. He earned his BA degree from the University of Puerto Rico and pursued graduate work in psychology at New York University. He and his wife Dr. Luz Towns-Miranda have been married for 41 years and have two adult children, Luz Miranda-Crespo and Lin Manuel Miranda. They reside in the Manhattan neighborhood of Washington Heights/Inwood.

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GABE GONZALEZ

Gabe Gonzalez is a Puerto Rican writer and comedian living in Brooklyn, NY. He’s been seen on Comedy Central’s Inside Amy Schumer and the HBO Latino documentary Hasta y Vista. He’s written and produced videos for places like MTV, Mic and Remezcla. You can find his latest work on MTV News as a host for their weekly show “Need To Know” or check him out on Scribb’s new quiz show “Hosting,” where he writes and hosts weekly shows focused on LGBTQ history and culture.
"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
Amalgamated Bank is proud to support Confluence Philanthropy’s 10th Annual Practitioners Gathering

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Brigit Peterson
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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.

PLENARY ORGANIZERS
- CLIMATE INTERACTIVE
- HIP HOP CAUCUS
- JOHN D. AND CATHERINE T. MACARTHUR FOUNDATION
- MERCER
- ROCKEFELLER PHILANTHROPY ADVISORS

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- ABACUS WEALTH PARTNERS
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- ECOTRUST FOREST MANAGEMENT
- GLOBAL ENDOWMENT MANAGEMENT
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- NATURAL INVESTMENTS
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- RSF SOCIAL FINANCE
- THE RUSSELL FAMILY FOUNDATION
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ACKNOWLEDGMENTS

THANK YOU TO OUR SPONSORS

RICKY MARTIN

I DON’T WANT TO DREAM ANYMORE. I WANT MY LIFE TO BE REAL!

IMPACT INVESTING HANDBOOK
COMING SOON

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- THE OCEAN FOUNDATION
- PUERTO RICO COMMUNITY FOUNDATION
- THE SIERRA CLUB FOUNDATION
- WILLIAM CASPAR GRAUSTEIN MEMORIAL FUND

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

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 $2.5 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.

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All investments have an impact. We promote values 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.

BOARD MEMBERS

FATIMA ANGELES
Vice President of Programs
California Wellness Foundation

DAN CHU
Executive Director
Sierra Club Foundation

STACEY FAELLA
Executive Director
Woodcock Foundation

IVAN FRISHBERG
Amalgamated Bank Foundation

DANNY KENNEDY
Chief Energy Officer
New Energy Nexus (Treasurer)

DANA LANZA
President, CEO & Co-Founder
Confluence Philanthropy (Secretary, ex officio)

LISA RENSTROM
Trustee
Bonwood Social Investments (Vice Chair)

JEFF ROSEN
Chief Financial Officer
Solidago Foundation (Audit Committee Chair)

LORENZO J. DE ROSENZWEIG PASQUEL
Executive Director
Fondo Mexicano para la Conservación de la Naturaleza, A.C

KATHLEEN SIMPSON
Chief Financial Officer
The Russell Family Foundation

MARK J. SPALDING
President
The Ocean Foundation (Board Chair)

DIANA TRUMP
Trustee and Treasurer
Penney Family Fund

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 – Open to Investors only
- Membership Committee – Open to Advisors and Investors
- Finance and Fundraising Committee – Open to Advisors and Investors

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

BOARD OF DIRECTORS

By providing vision, leadership, and accountability, the Board of Directors plays a vital role in ensuring Confluence continues to build the field and produces programs and services that meet the needs of our members. The Board works closely with the Confluence CEO and staff to ensure the 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 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 President and 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 programs. 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 David Estrada, Managing Director.

FINANCE AND FUNDRAISING COMMITTEE

The Finance and Fundraising Committee stewards fiscal management and fundraising at Confluence. The Committee meets three times a year and assists in strategizing fundraising efforts and managing the organization’s financial resources. To learn more about joining the Finance Committee, contact Dana Lanza, President and CEO.
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.

SPECIAL INITIATIVES AND COLLABORATIVES

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I believe in love.

—Jennifer Lopez