Building an ecosystem of responsible capital and a future of regenerative economies

Kauffman Foundation Conference Center

May 1, 2019

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**TODAY’S AGENDA**

May 1, 2019

8:00 Registration + Breakfast
8:10 Land recognition + Investing in impact  [Town Square]
8:30 Aligning values and investment
9:00 What it takes to build an ecosystem of impact investing
9:20 The role of investors in the impact ecosystem

10:30 Sessions
  + Community funding models and Opportunity Zones  [Town Square]
  + Artists, culture, and new investment models  [Paseo]
  + Impact in Indian Country  [Brookside]
  + Investing in climate resilience through food and water systems  [Brush Creek]
  + Investing towards comprehensively healthy and equitable communities  [Kansas City]

11:30 Lunch + Themed table conversations
12:00 Shaping our new economy through regenerative capitalism
12:45 Investing in our future
1:00 *Moral Economy* spoken word by Nika Renee
1:05 Power Talks Mashup: Investing with purpose - American Heartland and Indigenous Communities

Transition to MRIGlobal  [Arthur Mag Conference Center, 4920 Cherry Street]
2:30 Renewables and Native Energy Sovereignty Symposium
4:00 Happy hour featuring Kansas City and Native foods
THANK YOU TO OUR SPONSORS

Travois is a mission-driven business focused on promoting housing, economic development, and impact opportunities for American Indian, Alaska Native, and Native Hawaiian communities across the country. Travois is a Certified B Corporation—meeting the highest standards of social and environmental impact.

www.travois.com

AltCap is a community development financial institution that invests in underestimated communities throughout the Kansas City metro. We deploy capital through innovative financing products, targeted small business and economic development programming, and partnerships that help build an inclusive ecosystem of entrepreneurship.

www.alt-cap.org

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ORGANIZERS

Travois

AltCap
Land recognition + investing in impact

Phil Glynn, Travois
Dr. Daniel Wildcat, Haskell Indian Nations University

Phil Glynn is president of Travois. Travois has brought $1.4 billion of investment to Indian Country since 1995 for affordable housing and community-based economic development. Travois is proud to be a Native American Finance Officers Association corporate partner. Phil holds a master’s degree in Public Administration from the University of Missouri-Kansas City and a bachelor’s in English from Wake Forest University.

Dr. Daniel R. Wildcat is a Yuchi member of the Muscogee Nation of Oklahoma. He is interim Vice-President of Academics at Haskell Indian Nations University in Lawrence, Kansas and his service as a teacher and administrator at Haskell spans 33 years. Dr. Wildcat formed the American Indian and Alaska Native Climate Change Working Group: a tribal college-centered network. He is author and editor of several books including his most recent book, Red Alert: Saving the Planet with Indigenous Knowledge, suggesting environmental issues will require the exercise of indigenous ingenuity - indigenuity - and wisdom if humankind is to reduce the environmental damage underway.

Aligning values and investment

Morgan Simon, Author, Real Impact: The New Economics of Social Change and Founding Partner, Candide Group

Morgan Simon has close to two decades of experience making finance a tool for social justice. In that time she has influenced over $150B and is a regularly sought out expert on impact investing. Her book, Real Impact: The New Economics of Social Change has been featured everywhere from Harvard Business School to the United Nations. She is a regular voice in media and active investor as Founding Partner of Candide Group, a Registered Investment Advisor.

What it takes to build an ecosystem of impact investing

Mark Beam, Kauffman Foundation

Mark Beam and his team at the Kauffman Foundation experiment with novel ideas that can strengthen entrepreneurs and their communities. Living systems and regenerative economics provide an underlying foundation for cooperative, transformational design. Mark’s experience as an entrepreneur, impact investor, media theorist and social architect follows a decade working on Wall Street. He founded a pivotal human-centered media & technology event series in San Francisco just as the Web was born, (New Minds); co-founded the largest Impact Investment gathering globally (SOCAP); a music festival for social innovation human-centered media & technology event series in San Francisco just as the Web was born, (New Minds); to the United Nations. She is a regular voice in media and active investor as Founding Partner of Candide Group, a Registered Investment Advisor.

The role of investors in the impact ecosystem

Justin Conway, Vice President of Investment Partnerships, Calvert Impact Capital

Imogen Rose-Smith, Investment Fellow, University of California, Office of the President

Larry Jacob, Vice President of Public Affairs, Kauffman Foundation

Justin Conway, Vice President of Investment Partnerships at Calvert Impact Capital, helps people and institutions channel over $2 billion in impact investments to social enterprises throughout the U.S. and around the world. He enjoys working closely with the investors and financial professionals at the forefront of using investment capital for social impact.

Imogen Rose-Smith, Investment Fellow with the University of California, advises the $114 billion office of the chief investment officer on impact and sustainable investing and serves on the venture capital investment team. She is an author and journalist covering institutional asset management, foundations, endowment, sovereign wealth funds, venture capital, hedge funds, private equity, and impact investing.

Larry Jacob, Vice President of Public Affairs at the Ewing Marion Kauffman Foundation, leads all internal and external communications with emphasis on marketing activities, institutional branding, media relations, employee communications, and executive support. He is critical to the strategy and partnership development for Kansas City grant making under the foundation’s KC Civic engagement program.
Sessions

Community funding models and Opportunity Zones

Discussion Leader: Ruben Alonso, President, AltCap
Kim Arnone, Vice President, Cutting Edge Capital
Little Fawn Boland, Owner, Celba Legal
Karla Maxwell, Shareholder, Polsinelli
Adam Northup, Financial Strategist, LOCUS
Jeff White, Managing Member, Columbia Capital Management

Artists, culture, and new investment models

Discussion Leader: Penelope Douglas, Founding Partner, Culture Bank
Deborah Cuellar, CEO, Yerba Buena Center for the Arts and Founding Partner, CultureBank
Ebony Edwards, PhD, Co-Founder and CEO, MovementEC
Phil Kirshman, Chief Investment Officer, Cornerstone Capital Group

Impact in Indian Country

Discussion Leader: Chrystal Cornelius, Executive Director, First Nations Oweesta Corporation
Marc Diaz, Senior Vice President of TerViva
Nathaniel Dayna, JumpScale
Lance Morgan, President and CEO, Ho-Chunk Inc.

Investing in climate resilience through food and water systems

Discussion Leader: Joshua Humphreys, President, Croatan Institute
Dave Archambault II, Board, Native American Venture Fund
Reggie Hall, Director of Conservation Loans and Conservation Acquisition, The Conservation Fund
Emily Lecuyer, Analyst, Chess Ag Full Harvest Partners
Gretchen Waddell-Barwick, Assistant Chapter Director, Sierra Club Missouri

Investing towards comprehensively healthy and equitable communities

Discussion Leader: David Desai-Ramirez, Executive Director—Southern Region, IFF
Jean-Paul Chaurand, Vice President, H&R Block Foundation
Druzdja Delgadoilla, Director of Strategic Partnerships, KaBoom!
Tim Ferguson, Founder and Chairman, Next Street
Jessica Stago, Change Labs
Eric White, CAIA, Principal, Cogent Consulting
Power talks mashup + Symposium

Investing with purpose - American Heartland and Indigenous Communities

Sustainable and engaged investing can be positively influenced by the values and action coming from the American Heartland, Influencers and innovation within Indigenous Communities and emerging economies model the building of regenerative ecosystems. This session showcases ecosystem leaders who are shaping our path toward a moral economy.

Joshua Humphreys  
President and Senior Fellow, Croatan Institute

Lance Morgan  
President and CEO, Ho-Chunk Inc., Winnebago Tribe

Tom Light  
Managing Director, WaterEquity

Ramón Murguía  
Immediate past Chair of Board of Trustees, W.K. Kellogg Foundation

Joshua Humphreys  
President and Senior Fellow, Croatan Institute

Lance Morgan  
President and CEO, Ho-Chunk Inc., Winnebago Tribe

Tom Light  
Managing Director, WaterEquity

Dana Lanza  
CEO, Confluence Philanthropy

Peter Grubstein  
Executive Managing Director, NGEN Partners

Dave Archambault II  
45th Chairman, Standing Rock Sioux Tribe and Senior Fellow, First Peoples Investor Engagement Program

SPOKEN WORD PERFORMANCE

Nika Renee  
Poet, community organizer, and self-published author from Kansas City, Kansas. Nika is founder of the Soulcentricitea Collective, located on the historic racial dividing line of Troost Avenue and featuring handmade items by local Black women artisans. She currently serves as Regional Coordinator for Poetry for Personal Power and as a freelance project consultant with Women on the Rooftop-WR Collective.

Nika Renee

Investing in our future

Ruben Alonso III  
President, AltCap

As President of AltCap, Ruben has grown the organization from a community development entity (CDE) specializing in New Markets Tax Credit (NMTC) facilitated financing to a socially entrepreneurial community development financial institution (CDFI) and SBA Microloan Intermediary. AltCap has provided over $200 million in tax credit enhanced financing to job creating businesses and catalytic real estate development projects in underestimated communities throughout Kansas City. Ruben has leveraged this success to increase AltCap’s capital deployment efforts to include small business and microlender products, providing over $8MM in financing since 2015 to entrepreneurs underserved by mainstream financial institutions. Ruben is currently focusing on launching AltCap’s first Opportunity Fund to further its impact investing in MO/KS Opportunity Zones. Ruben was a U.S. Peace Corps Volunteer in Slovakia, a graduate of the Centurions Leadership Program, is a member of the Community Advisory Committee for IFF, and a member of the Community Development Advisory Council for the Federal Reserve Bank of Kansas City.

Nika Renee is a poet and community organizer, and self-published author from Kansas City, Kansas. Nika is founder of the Soulcentricitea Collective, located on the historic racial dividing line of Troost Avenue and featuring handmade items by local Black women artisans. She currently serves as Regional Coordinator for Poetry for Personal Power and as a freelance project consultant with Women on the Rooftop-WR Collective.

Nika Renee

Shaping our new economy through regenerative capitalism

John Fullerton  
Founder and President, Capital Institute

John Fullerton is an unconventional economist, impact investor, writer, and philosopher. Building on and integrating the work of many, he is the architect of Regenerative Economics, first conceived in his 2015 booklet, “Regenerative Capitalism: How Universal Patterns and Principles Will Shape the New Economy.” Fullerton is the founder and president of Capital Institute, a collaborative working to illuminate how our economy and financial system can operate to promote a more just, regenerative, and thus sustainable way of living on this earth. Through the work of Capital Institute, regular public speaking engagements, and university lectures, John has become a recognized thought leader, exploring the future of capitalism.
Renewables & Native Energy Sovereignty Symposium

Hosted by MRIGlobal in the Mag Auditorium, the Impact Investing Day closing symposium is an investment-friendly space to hear from innovators and influencers. Co-chairs will facilitate rotating small group conversations featuring renewable initiatives and Native energy sovereignty projects. We will learn and engage in the spirit of rotating credit and cooperative idea sharing. Dr. Thomas Sack, CEO of MRIGlobal, will open and artist and energy entrepreneur, AY Young with the Battery Tour, to transition to happy hour.

Discussion Co-Chairs: Little Fawn Boland, Ceiba Legal and Danny Kennedy, CA Clean Energy Fund

Presenters:
- Navajo Power, Brett Isaac
- Native Renewables, Wahleah Johns
- Invest In Energy Corporation, Terry Kibbe
- MRIGlobal and Travois, John Stanley, Frank Pendelton, and Phil Glynn
- Spokane Tribe and Sovereign Power, Mike Tedesco and Jason Campbell

4:00 pm Happy hour featuring Ioway Bee Farm honey (Iowa Tribe of Kansas and Nebraska), Bedré Fine Chocolate (Chickasaw Nation), Kansas City's Stockyards Brewing Co., and Lal's Sweet Chili Sauce.