

AGENDA

WEDNESDAY | JUNE 14

7:45 AM – 8:45 AM	CONTINENTAL BREAKFAST & CHECK-IN
8:45 AM – 10:10 AM SAFRA HALL	<p>WELCOME Alexander Rossides <i>Founder and Co-President, Social Impact Exchange</i> Melanie Schnoll Begun <i>Managing Director, Head of Philanthropy Management, Morgan Stanley</i></p> <p>OPENING PLENARY PANEL</p> <p>How Can Philanthropy Maximize Its Impact?</p> <p>Philanthropy often works on the toughest challenges - the ones that have defied market and government solutions. Both individual philanthropists and foundations can be frustrated by the slow pace of change, and by not making more of a difference on these difficult challenges. What does it take to achieve results? There are no easy answers, but this panel will explore this and related questions, drawing on the perspectives of three foundation CEOs and research on the “Future of Foundation Philanthropy” conducted by the Center for Effective Philanthropy. Among the topics the panelists will consider are how to overcome barriers to effective collaboration, how to embrace risk, how to listen and learn from the perspectives of grantees and intended beneficiaries, how to learn from the past, and the potential promise of practices such as impact investing.</p> <p>MODERATOR: Phil Buchanan <i>President, The Center for Effective Philanthropy</i></p> <p>Nicky Goren <i>President and CEO, Eugene and Agnes E. Meyer Foundation</i> Kelvin Taketa <i>CEO, Hawaii Community Foundation</i> Kate Wolford <i>President, The McKnight Foundation</i></p>
10:10 AM – 10:20 AM	BREAK
10:20 AM – 11:45 AM	<p>CONCURRENT BREAKOUT SESSIONS</p> <p>Collaborative Networks: Cracking the Collaboration Code</p> <p>The conversation moves from the stage to the meeting room. Three of the four sessions will discuss how collaborative networks can exponentially expand and integrate cross-sector partners in order to break through to large scale impact. Each breakout focuses on a different issue area (health, education, and economic mobility). Participants will break into small group conversations to discuss how to apply the ideas in their current grantmaking environments. We will also offer specific post-conference opportunities for attendees to get engaged in break-through collaborations.</p>

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CLASSROOM A/B	<p>A. Collaborative Networks – HEALTH</p> <p>MODERATOR: Stacy Becker <i>Vice President, Programs, Fannie E. Rippel Foundation</i></p> <p>Brian Castrucci <i>Chief Program and Strategy Officer, de Beaumont Foundation</i> Amanda Maria Navarro <i>Senior Director, PolicyLink</i> Kitty Bailey <i>Executive Director, Be There San Diego</i></p>
CLASSROOM C/D	<p>B. Collaborative Networks – EDUCATION</p> <p>MODERATOR: Kyle Malone <i>Senior Manager of Partnerships, Grantmakers for Education</i></p> <p>MC Belk Pilon <i>Chair, John M. Belk Endowment</i> Cyrus Driver <i>Senior Director of Strategy and Program, National Public Education Support Fund</i> Chrystie Hill <i>Senior Program Officer, Post-Secondary Success Strategy, Bill & Melinda Gates Foundation</i></p>
CAFÉ	<p>C. Collaborative Networks – ECONOMIC MOBILITY</p> <p>MODERATOR: Anna Muoio, <i>Specialist Leader, Monitor Institute-Deloitte</i></p> <p>Irene Lee <i>Director of Family Economic Success, The Annie E. Casey Foundation</i> Chantel Rush <i>Program Officer, The Kresge Foundation</i> Abby Jo Sigal <i>Executive Director, James and Judith K. Dimon Foundation</i></p>
SAFRA HALL	<p>D. Breaking Through to the Next Level of Impact – IMPACT INVESTING</p> <p>This session will first offer the audience an update on this emerging field. What are the current trends? Who is investing and how? What level of social impact is being achieved in human terms? The discussion will then turn to the future to explore how to build a pipeline of accessible high-impact investments and how to unleash exponentially more capital to achieve far greater impact. Panelists will discuss how foundation endowments can be used to support breakthrough impact in the sector. What kinds of double bottom line investments are needed? How can we engage more individual investors in impact investing through a more effective distribution infrastructure?</p> <p>MODERATOR: Audrey Choi <i>Chief Marketing Officer and Chief Sustainability Officer, Morgan Stanley</i></p> <p>Ardyth Neill <i>President, Heifer Foundation</i> Jim Lumberg <i>Co-Founder and Executive Vice President, Envestnet</i> Clara Miller <i>Director and President, F.B. Heron Foundation</i> Kristina Van Liew <i>Managing Director, Institutional Consulting Director at Graystone Consulting, Morgan Stanley</i></p>

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<p>11:45 AM – 1:15 PM EVENTS HALL, SECOND FLOOR</p>	<p>LUNCHEON PLENARY: How to Scale Up Solutions and Change Systems <i>“Making systems work is the greatest task of my generation of physicians and scientists. But I would go farther and say that making systems work — whether in health care, education, climate change, making a path out of poverty — is the greatest task of our generation as a whole.”</i></p> <p>KEYNOTE Atul Gawande, M.D Author, Surgeon, and Founder and Executive Director, Ariadne Labs</p> <p>Renowned author and leader Atul Gawande will share his insights on how society can achieve massive social progress by focusing on changing systems, scaling practices, and interventions within them.</p>
<p>1:15 PM – 1:30 PM</p>	<p>BREAK</p>
<p>1:30 PM – 2:50 PM SAFRA HALL</p>	<p>The S. Robert Levine Scaling in Action® Program</p> <p>This year’s <i>Scaling in Action</i>® will focus on systems change as a critical strategy for achieving large-scale impact. Learn about the power of systems change from a thought leader in systems science, and hear from social entrepreneurs who will present their systems change initiatives and discuss what they need to implement their plans.</p> <p>MODERATOR: Fay Hanleybrown Managing Director, FSG</p> <p>Rob Densen Founder and CEO, Tiller, LLC Laura Landy President and CEO, Fannie E. Rippel Foundation Heather Nesle President, New York Life Foundation Rick Reed Executive Producer – Collaborative Networks, Garfield Foundation Alexander Rossides Founder and Co-President, Social Impact Exchange David Peter Stroh Principal, Bridgeway Partners</p>
<p>2:50 PM – 3:00 PM</p>	<p>BREAK</p>
<p>3:00 PM – 3:45 PM SAFRA HALL</p>	<p>KEYNOTE James P. Gorman Chairman & Chief Executive Officer, Morgan Stanley</p>
<p>3:45 PM – 4:15 PM SAFRA HALL</p>	<p>The S. Robert Levine Scaling in Action® Program (Part II)</p>
<p>4:15 PM – 5:15 PM SAFRA HALL</p>	<p>PLENARY: Leadership for a Changing Sector and a Changing World</p> <p>Concerns about leadership in the social sector have long been a topic of conversation and action. The social sector and society at-large would benefit immensely from a new cadre of leaders who understand and respond to seismic shifts in our nation’s</p>

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	<p>demographics, social norms, economy, social sector systems and political institutions. Our panelists will discuss why there has never been a more urgent time to discuss leadership in this sector, its vital role in forging coalitions that drive large-scale change, and what we can do to support it.</p> <p>MODERATOR: Rusty Stahl Founder, President and CEO, Fund the People Monisha Kapila Founder and CEO, ProInspire Ashley Stewart Senior Associate of Talent and Leadership Development, The Annie E. Casey Foundation Judy Vredenburg President and CEO, Girls Inc.</p>
<p>5:30 PM – 6:15 PM SAFRA HALL</p>	<p>PLENARY: Philanthropy for a New Era – Big Goals and New Rules</p> <p>KEYNOTE Marcus Shingles CEO, XPRIZE</p> <p>Innovations in today’s philanthropy have the potential to disrupt the field in unprecedented ways. Will they necessarily yield breakthrough results and population-level impact, however? XPRIZE’s unique model and track record in developing major prizes is an exciting example of this new approach to philanthropy that is catalyzing game-changing innovations. Marcus Shingles will discuss the philosophy behind the XPRIZE model, how it can help foster collaboration and shift fields, and the potential of prizes to generate deep and lasting impact.</p>
<p>6:15 PM – 7:00 PM SECOND FLOOR LOBBY</p>	<p>COCKTAIL RECEPTION</p>
<p>7:00 PM – 9:00 PM EVENTS HALL, SECOND FLOOR</p>	<p>DINNER</p> <p>A Family (R)evolution:</p> <p>A Conversation with Lin-Manuel Miranda Pulitzer Prize-winning Composer, Lyricist & Actor, and Luis A. Miranda, Jr. Managing Partner, MirRam Group</p> <p>Through the language and rhythm of hip hop, and with a sizzling multi-ethnic cast, Lin-Manuel Miranda is telling a riveting story about our country’s formation to sold-out crowds in his Broadway phenomenon <i>Hamilton</i>. His creative genius and masterful storytelling have made this Tony Award-winning musical one of the hottest tickets on Broadway.</p> <p>History, culture and values shape and drive philanthropy in our country. In a time of heightened social, political, and cultural awareness, leaders must be courageous and unifying. Lin-Manuel Miranda and his father, Luis Miranda, Jr. — a political consultant and community activist, who has previously served in three New York City administrations — will discuss the evolution of their approach to philanthropy and how they navigate public perception, responsibility, and expectations as leaders in their community and beyond.</p>

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7:45 AM – 8:30 AM	CONTINENTAL BREAKFAST & CHECK-IN
8:30 AM – 9:45 AM SAFRA HALL	<p>PLENARY PANEL SESSION: Strategies for Breaking Through</p> <p>How do visionary philanthropists effectively implement their charitable missions? During this plenary session, inspirational philanthropists and professional foundation executives will discuss how a powerful and strategic vision can foster breakthroughs and drive lasting social change. In particular, the conversation will focus on how collaboration and a willingness to test innovative approaches can generate large-scale impact.</p> <p>MODERATOR: Zia Khan <i>Vice President of Initiatives & Strategy, The Rockefeller Foundation</i></p> <p>Ron Bruder <i>Founder and Chairman, Education for Employment</i> Lisa Sobrato Sonsini <i>President, Sobrato Family Foundation</i> Kim Starkey Jonker <i>President and CEO, King Philanthropies and Lecturer, Stanford Graduate School of Business</i> Jane Wurwand <i>Founder, Dermalogica and FITE (Financial Independence Through Entrepreneurship)</i></p>
9:45 AM – 10:00 AM	BREAK
10:00 AM – 11:30 AM	<p>CONCURRENT BREAKOUT SESSIONS</p> <p>Connecting the Dots on “Big Bets”</p> <p>Making big bets on specific solutions is gaining traction among thought leaders and practitioners as a key strategy for achieving large-scale impact. At the same time, we know there are no silver bullets that will solve the difficult issues we face. To address this inherent tension, these sessions will explore how to formulate integrated approaches that simultaneously combine multiple big bets into coordinated strategies. The sessions will include various strategies (e.g., combining public policy, programs, and communications) that together begin to shape an integrated approach. The objective is to go from isolated big bets to mega integrated bets that achieve major progress on our toughest social problems.</p>
CLASSROOM A/B	<p>A. Big Bets in HEALTH</p> <p>MODERATOR: Christopher Langston <i>Vice President, Aging in New York Fund</i></p> <p>Melinda Abrams <i>Vice President, The Commonwealth Fund</i> Diane Meier <i>Director, Center to Advance Palliative Care</i> Emily Zyborowicz <i>Manager of Research and Identification, Peterson Center on Healthcare</i></p>

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CLASSROOM C/D	<p>B. Big Bets in EDUCATION</p> <p>MODERATOR: Richard Laine <i>Independent Consultant, former Director of Education, National Governors Association</i></p> <p>Scott Hartl <i>Founder and CEO, EL Education</i> Marc Chun <i>Program Officer, William & Flora Hewlett Foundation</i> Bill Tucker <i>Senior Advisor K-12 program, Bill & Melinda Gates Foundation</i></p>
CAFÉ	<p>C. Big Bets in ECONOMIC MOBILITY</p> <p>MODERATOR: Bill Breen <i>Bridgespan</i></p> <p>Danielle Campos <i>National Philanthropy Manager, Bank of America Charitable Foundation</i> Libby Doggett <i>former U.S. Deputy Assistant Secretary for Policy and Early Learning</i> Jean Horstman <i>President, Interise Inc.</i> Devin Murphy <i>Manager, Bridgespan</i></p>
EVENTS HALL, SECOND FLOOR	<p>D. Big Bets in ENVIRONMENT</p> <p><i>This session is sponsored by the Cornerstone Capital Group</i></p> <p>Climate change presents a clear and present danger to the systems that support life on Earth. This session will explore some of the creative ways both philanthropy and impact investing are addressing this issue and what we can do to accelerate these efforts with coordinated big bets.</p> <p>MODERATOR: Chad Bolick <i>Executive Director, Morgan Stanley</i></p> <p>Jim Flatt <i>Chief of Research & Development, Hampton Creek</i> Joanna Messing <i>Executive Director, Growald Family Fund</i> Sarah Kearney <i>Founder, PRIME Coalition</i> Jessy Tolkan <i>Head of Labs & Executive Director, Purpose Climate Lab</i></p>
SAFRA HALL	<p>E. Women and the Future of Impact Investing</p> <p>Women currently control 39% of all investible assets — a figure set to rise to 50% by 2020. Furthermore, over the next four decades, women will inherit 70% of the \$41 trillion in inter-generational wealth transfer. With a more positive inclination toward socially responsible and impact investing than their male counterparts, women will increasingly define the field of impact investing. But where are the on-ramps for women investors? How are female advisors guiding these clients? What are the unique opportunities for women? And most important, are women driving better social outcomes through their impact investments? We will explore these questions with some of the leading women behind the ongoing development of the field.</p> <p style="text-align: right;"><i>(continued on next page)</i></p>

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	<p><i>(continued from previous page)</i></p> <p>MODERATOR: Lily Trager <i>Director of Investing with Impact, Morgan Stanley</i></p> <p>Lauren Booker Allen <i>Senior Manager of Impact Investing, Omidyar Network</i></p> <p>Sukhinder Singh Cassidy <i>Founder & CEO, Joyus & Founder, theBoardlist</i></p> <p>Andrea Turner Moffitt <i>Co-Founder, Plum Alley Investments</i></p>		
11:30 AM – 11:40 AM	BREAK		
11:40 AM – 1:10 PM	<p>CONCURRENT BREAKOUT SESSIONS</p> <p>Systems Change in Practice</p> <p>With core themes of education, health, economic mobility, and the environment, this third set of breakouts focuses on systems change in practice. Each session will utilize a case study to explore concrete steps and methods used in a specific system change initiative and how it can be emulated in a variety of geographies and issues. In the discussions, participants will learn what worked, what can be improved, and what is needed to realize the potential of this challenging but game-changing strategy.</p>		
CLASSROOM A/B	<p>A. HEALTH Case Study – Dramatically Reducing Chronic Illness in the U.S.</p> <p>PRESENTERS:</p> <p>James Ritchie-Dunham <i>President, Vibrancy</i></p> <p>Alexander Rossides <i>Founder & Co-President, Social Impact Exchange</i></p>		
CLASSROOM C/D	<p>B. EDUCATION Case Study – Transforming STEM Education</p> <p>PRESENTER: Talia Milgrom-Elcott <i>CEO, 100Kin10</i></p>		
CAFÉ	<p>C. ECONOMIC MOBILITY Case Study – Economic Development and Vibrant Communities</p> <p>PRESENTER: Carol Naughton <i>President, Purpose Built Communities</i></p>		
SAFRA HALL	<p>D. ENVIRONMENT Case Study – Tackling Climate Change with Systemic Solutions</p> <p><i>This session is sponsored by the Cornerstone Capital Group</i></p> <p>PRESENTER: Melissa Gavin <i>Interim Network Chief Executive Officer, RE-AMP</i></p>		
		<p>1:10 PM – 3:00 PM</p> <p>EVENTS HALL, SECOND FLOOR</p>	<p>LUNCHEON PLENARY: Integration Strategies – Combining Multiple Strategies to Achieve Outcomes at Scale</p> <p>Social innovation isn't always about doing something different; oftentimes, it's about doing something <i>differently</i>. Three sector leaders with diverse professional roles and backgrounds discuss how change is possible when we expand or break through the narrowly-defined boundaries of specific interventions. By collaborating at the community level to integrate efforts across sectors, it is possible to change systems and achieve impact at scale. Drawing on their combined experience in philanthropy, social entrepreneurship, service delivery, advocacy, and research, our speakers will share both the opportunities and challenges they see and talk about why a more integrated approach is a vital way forward for achieving outcomes at scale.</p> <p>MODERATOR: Kerry Sullivan <i>President, Bank of America Charitable Foundation</i></p> <p>Leslie Crutchfield <i>Author and Executive Director, Georgetown University Global Social Enterprise Initiative (GSEI)</i></p> <p>Rosanne Haggerty <i>President, Community Solutions</i></p> <p>Ben Hecht <i>President and CEO, Living Cities</i></p>