

# AGENDA

## WEDNESDAY | JUNE 22

|                     |  |
|---------------------|--|
| 7:30 AM – 8:30 AM   | <b>REGISTRATION &amp; CONTINENTAL BREAKFAST</b> (Museum Lobby)   |
| 8:30 AM – 9:45 AM   | <p><b>OPENING PLENARY</b> (Safra Hall)</p> <p><b>WELCOME</b> Alex Rossides   <i>President and Co-Founder, Social Impact Exchange</i></p> <p><b>KEYNOTE: The Potential of Collective Action to Drive Large Scale Social Change</b></p> <p><b>Carol Larson</b>   <i>President and CEO, The David and Lucile Packard Foundation</i></p> <p>Under Carol Larson’s leadership, the Packard Foundation has demonstrated the power of collective action in philanthropy by working in collaboration with other funders and bringing together multi-stakeholders across sectors to achieve results. Carol will share what she and her team have learned from their experiences with this approach, including success factors and challenges. She will discuss the potential for leveraging broader impact and explain how and why foundations of all types and sizes can have greater impact by working more collaboratively toward common goals. Her comments will be followed by audience Q&amp;A.</p>  |
| 9:45 AM – 10:00 AM  | <b>NETWORKING BREAK</b>  |
| 10:00 AM – 12:30 PM | <p><b>CONCURRENT BREAKOUT SESSIONS</b></p> <p><b>A. Promising Approaches to Systems Change</b> (Classroom C/D)</p> <p>Changing entire systems such as child welfare, public schools or primary care — as a scaling strategy is a common but elusive goal. How do we successfully implement systems change? With so many moving parts and entrenched interests, it is a daunting task for philanthropy to tackle. New approaches are addressing this challenge, often through multi-part, multi-stakeholder coordinated action. In this session, participants will learn about several of these approaches, the rationale behind them, the strategies they are based on and what has and has not worked in their implementation. The differences as well as the similarities in the approaches will be explored. Audience members break into smaller groups for more in-depth, smaller group discussion about the different approaches, with a goal of learning how they might implement similar approaches in their own work.</p> <p><b>MODERATOR: Nicholas Donohue</b>   <i>President and CEO, The Nellie Mae Education Foundation</i></p> <p><b>Nicholas Donohue</b>   <i>President and CEO, The Nellie Mae Education Foundation</i><br/> <b>Nicole Farmer Hurd, Ph.D.</b>   <i>Founder and CEO, College Advising Corps</i><br/> <b>Laura Landy</b>   <i>President and CEO, The Rippel Foundation</i><br/> <b>Andrew Wolk</b>   <i>CEO, Root Cause</i></p> |

## WEDNESDAY | JUNE 22

|   |
|---|
| <p><b>B. SIBs and Pay-for-Success: Latest Lessons Learned and Strategies to Scale Their Impact</b> (Theater/Café)</p> <p>Social Impact Bonds (SIBs) and Pay-for-Success (PFS) deals are growing in popularity. What have we learned to date about how to structure successful SIB and PFS deals so that they generate significant social impact and enhance the capacity and sustainability of nonprofits? What are important design criteria for SIB/PFS deals and what are the key success factors that grantmakers and investors should know about? How can funders ascertain whether a SIB/PFS is an appropriate strategy and what steps should funders take to explore a SIB or PFS opportunity? Funders will come away from this session with answers to these and other SIB/PFS implementation questions. The session will also explore what the philanthropic, business and public sectors can do to help ensure that the SIB/PFS field achieves its promise of generating large-scale impact in addition to financial returns for investors. In addition to the panel discussion, participants will walk through a SIB creation exercise in small groups. Participants are encouraged to bring and discuss their own ideas for a SIB/PFS deal.</p> <p><b>MODERATOR: Hanna Azemati</b>   <i>Assistant Director, Harvard – Government Performance Lab</i></p> <p><b>Dash Boyer-Olson</b>   <i>Director, Product Origination, Merrill Lynch</i><br/> <b>David Butler</b>   <i>Consultant, MDRC</i><br/> <b>Sam Schaeffer</b>   <i>CEO, Center for Employment Opportunities (CEO)</i><br/> <b>Jeff Shumway</b>   <i>Vice President, Advisory Services, Social Finance US</i></p> |
| <p><b>C. For-Benefit, Part 1: Is the For-Benefit Enterprise the Scalable Social Impact Business Model of the 21st Century?</b> (Classroom A/B)</p> <p><i>This track is sponsored by Cornerstone Capital Group.</i></p> <p>Humanity now faces perhaps the most urgent, large scale, complex array of social and environmental challenges in its history. In response, a rapidly growing movement of social entrepreneurs around the world has been creating “for-benefit” enterprises. In the for-benefit business model, “doing good” isn’t merely a question of corporate responsibility or good citizenship; it’s the primary mission of the company and fundamental to how business gets done. For-benefit enterprises hold the promise of becoming the significant vehicles for driving social impact in the 21<sup>st</sup> century. A panel of experts will offer an overview of for-benefit enterprises, what makes them distinctive and how the for-benefit model can scale to solve major social and environmental problems. Participants will break into groups to discuss for-benefit applications in fields of interest to them, including health, education, food, economic development and more. Groups will also identify the supportive infrastructure that needs to be in place to enable for-benefit enterprises to flourish.</p> <p style="text-align: right;"><i>(continued on next page)</i></p>   |

# AGENDA

## WEDNESDAY | JUNE 22

|                           |   |
|---------------------------|---|
|                           | <p><i>(continued from previous page)</i></p> <p><b>MODERATOR:</b> Katherine Milligan   Director and Head, Schwab Foundation for Social Entrepreneurship</p> <p><b>PRESENTER:</b> Heerad Sabeti   Co-founder and Executive Director, Fourth Sector Networks</p> <p>William H. Clark, Jr.   Partner, Drinker Biddle Reath, LLP</p> <p>Rebecca Marmot   Vice President, Global Partnership, The Unilever Foundation</p> <p>James Martin   Vice President, Morgan Stanley Global Sustainable Finance Group</p> <p>Stephen Shaya, MD   Managing Director, J&amp;B Medical Company and Health Net Connect</p> <p>Martin Whittaker   CEO, JUST Capital</p>   |
|                           | <p><b>D. Achieving Large-Scale Impact (Events Hall, 2nd Floor)</b></p> <p>Today's individual and family donors face a significant challenge: how can they maximize the positive results of their philanthropic giving? Aristotle's quote still rings true today in a world full of problems: "To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter." In this session, designed specifically for individual and family donors, participants will explore two keys to generating broad-based outcomes — scale and impact. Why has it been so difficult in the sector to achieve these twin goals? How do we know when we are having impact? How do we design for impact and scale? In this session participants will delve into these and other questions with leading experts and peer small group discussions. A panel of peer philanthropists will also share their experiences in creating measurable, high-impact initiatives that are scaling to achieve broad impact. Participants will leave the session with new peer relationships, tangible knowledge that can help them in their philanthropy, and opportunities to take action.</p> <p><b>MODERATORS:</b> Chad Bolick   Executive Director, Morgan Stanley Philanthropy Management<br/>David Medina   COO and Co-Founder, Results for America</p> <p>Gordon Berlin   President, MDRC</p> <p>Josh McGee   Vice President of Public Accountability, Laura and John Arnold Foundation</p> <p>Kimbal Musk   CEO, The Kitchen Community, and Board member, Tesla Motors</p> <p>Kevin Trapani   President and CEO, The Redwoods Group</p> <p>George Weiss   President, George Weiss Associates</p> |
| <b>12:30 PM – 2:15 PM</b> | <p><b>LUNCHEON PLENARY: Systems Change and Cross-Sector Leadership PANEL DISCUSSION (Events Hall, 2nd Floor)</b></p> <p>A fireside chat with Kerry Sullivan, President, The Bank of America Charitable Foundation and Antony Bugg-Levine, CEO, Nonprofit Finance Fund, kicks off this luncheon plenary, followed by an expert panel that discusses frameworks for pursuing</p>  |

## WEDNESDAY | JUNE 22

|                          |  |
|--------------------------|--|
|                          | <p>systems change and the type of cross-sector leadership required to achieve it. The panel will explore what it takes to bring multi-stakeholder networks and communities together to work collectively to alter systems that touch millions of lives. How the corporate, nonprofit, and government sectors can contribute unique assets and align incentives to achieve common outcomes will be discussed with specific examples. The distinctive "systems leadership" capabilities that can foster this type of broad collaboration that goes beyond any single organization will be identified with tangible examples and organizations that are providing this type of leadership.</p> <p><b>MODERATOR:</b> Anna Muoio   Specialist, Monitor Institute / Deloitte Consulting LLP</p> <p>Molly Baldwin   Founder and CEO, Roca</p> <p>Antony Bugg-Levine   CEO, Nonprofit Finance Fund</p> <p>Nicholas Donohue   President and CEO, The Nellie Mae Education Foundation</p> <p>Rick Reed   Executive Producer-Collaborative Networks, Garfield Foundation</p> <p>Kerry Sullivan   President, The Bank of America Charitable Foundation</p> |
| <b>2:15 PM – 2:30 PM</b> | <b>NETWORKING BREAK</b>  |
| <b>2:30 PM – 4:30 PM</b> | <p><b>SCALING IN ACTION (Safr Hall)</b></p> <p>Scaling in Action features presentations from four of the nation's leading nonprofits, each scaling their efforts to address critical urgent issues. These leaders will present their growth plans and take questions from the audience.</p> <p><b>MODERATOR:</b> Paul Connolly   Director, Philanthropic Services, Bessemer Trust</p> <p>Sasha Dichter   Chief Innovation Officer, Acumen</p> <p>Larry Soler   President and CEO, Partnership for a Healthier America</p> <p>Terri Sorenson   President, Friends of the Children</p> <p>Jared Susco   COO, Camden Coalition of Healthcare Providers</p>  |
| <b>4:30 PM – 5:30 PM</b> | <p><b>The Power of Photography and Story Telling to Achieve Scaled Impact (Safr Hall)</b></p> <p>Platon Antoniou   Founder, The People's Portfolio</p> <p>A picture paints a thousand words — how can the social sector leverage the power of the photographic image to scale social impact? The Social Impact Exchange is delighted to welcome internationally acclaimed photographer and human rights activist Platon, who will discuss how photography can advance a global human rights agenda. Platon is an internationally renowned photographer and founder of The People's Portfolio, a nonprofit organization that documents efforts around the globe dedicated to respecting and upholding human rights and human dignity.</p>   |
| <b>5:30 PM – 7:30 PM</b> | <b>COCKTAIL RECEPTION (2nd Floor Lobby)</b>  |

# AGENDA

## THURSDAY | JUNE 23

|                    |   |
|--------------------|---|
| 7:30 AM – 8:30 AM  | <b>CONTINENTAL BREAKFAST &amp; CHECK-IN</b> (2nd Floor Lobby)   |
| 8:30 AM – 9:30 AM  | <p><b>PLENARY KEYNOTE</b> (Safra Hall)</p> <p><b>KEYNOTE</b> Deepak Chopra, M.D.   <i>Author, Physician, and Founder and Chairman of the Chopra Foundation</i></p> <p>Keynote will focus on the health and wellness benefits of mind-body practices for children and adults and the process of scaling a movement.</p>  |
| 9:30 AM – 9:45 AM  | <b>NETWORKING BREAK</b>   |
| 9:45 AM – 11:15 AM | <p><b>CONCURRENT BREAK-OUT SESSIONS</b></p> <p><b>A. Approaches that Support Scaled Impact Locally and Statewide</b> (Classroom A/B) <i>This session is sponsored by the James and Judith K. Dimon Foundation</i></p> <p>Most conversations about scale are from the national or global perspective, but the truth is that interventions are scaled in regions or communities. How do we achieve systems change and large-scale impact in a specific geography? Introducing and spreading a program, practice or policy to a new community or region is an art as much as it is a science. Creating local systems change can be a powerful strategy but can be challenging to implement well. In this session, a panel will discuss specific approaches underway in several cities to achieve systems change and large scale impact in education, with an emphasis on collaboration between local funders, service providers, and policy makers.</p> <p><b>MODERATOR:</b> Anne Sherman   <i>Vice President, Nonprofit Strategy, Social Impact Exchange</i></p> <p>Kathy Merchant   <i>Senior Fellow, StriveTogether</i></p> <p>Tynesia Boyea-Robinson   <i>Director of Collective Impact, Living Cities</i></p> <p>Mary Anne Schmitt-Carey   <i>President, Say Yes to Education</i></p> <p><b>B. Leveraging Networks in the New Century: Maximizing the Power of Networks for Social Change</b> (Classroom C/D)</p> <p>Research from the private sector demonstrates that collaborative approaches are often more effective — and even more efficient — in solving complex problems than the traditional model of “going it alone.” Technology has made coordinating networks increasingly accessible. What does the social sector need to harness these new tools and strategies to achieve results? How can we increasingly leverage action networks to achieve large-scale impact and transform systems that can alter outcomes for large segments of the population? This session will explore several approaches to action networks that engage large numbers of actors in coordinated efforts in support of a common purpose. Panelists will also share what they’ve learned about how to engage these networks successfully with ideas that audience members can apply in their own work.</p> <p><b>MODERATOR:</b> Anna Muoio   <i>Specialist, Monitor Institute / Deloitte Consulting LLP</i></p> |

## THURSDAY | JUNE 23

|  |
|--|
| <p>Faizal Karmali   <i>Associate Director, Network Engagement and Bellagio Programs, The Rockefeller Foundation</i></p> <p>Rick Reed   <i>Executive Producer, Collaborative Networks, Garfield Foundation</i></p> <p>Tracy Sawicki   <i>Executive Director, The Peter and Elizabeth C. Tower Foundation</i></p> <p>Shruti Sehra   <i>Managing Partner, New Profit</i></p> <p>David Smith   <i>President, Presidio Institute</i></p>  |
| <p><b>C. For-Benefit Part 2: Philanthropy’s Role in Scaling the For-Benefit Sector</b> (Café, 2nd Floor) <i>This track is sponsored by Cornerstone Capital Group</i></p> <p>Could a for-benefit economy flourish as the mainstream approach to conducting business? This session will build on the conversation begun the day before and explore how philanthropy can help create a supportive environment and ecosystem that enable for-benefit enterprises to thrive. Participants will discuss and brainstorm in groups how philanthropy might invest in the infrastructure to allow the for-benefit economy to flourish, such as policy, research, mobilizing finance, human capital, place-based economic development, education, and more. We will explore how philanthropy can shape and accelerate this emergent movement in order to unleash a wave of entrepreneurship and innovation to tackle the critical challenges of the 21<sup>st</sup> century at scale, delivering a more sustainable, inclusive and resilient economy. Participants will also be given an organized opportunity to continue the discussion and planning post conference.</p> <p><b>MODERATOR:</b> Katherine Milligan   <i>Director and Head, Schwab Foundation for Social Entrepreneurship</i></p> <p>Marilia Bezerra   <i>Founder and CEO, Aldeia Works; former Director of Commitments, Clinton Global Initiative</i></p> <p>Matthew Bogoshian   <i>Chief Strategy Officer, REV; former Senior Policy Counsel, U.S. EPA</i></p> <p>Allen Bromberger   <i>Partner, Perlman &amp; Perlman, LLP</i></p> <p>Russell Sullivan   <i>Partner, McGuideWoods LLP; former Staff Director, U.S. Senate Committee on Finance</i></p> |
| <p><b>D. Family Dynamics: Unlocking the Power of Family Philanthropy</b> (Events Hall, 2nd Floor)</p> <p>In this session for philanthropic individuals and families, we will discuss the joys and challenges families face when practicing philanthropy together. Family philanthropy can be accomplished using a variety of structures including a nonprofit or corporate foundation, a family business, private foundation or donor advised fund. Inclusion and exclusion, areas of focus, anonymity or public awareness, succession or cessation, can all play a role and a toll on a family’s philanthropic success. Accomplished philanthropists and experts will share lessons learned and lead peer discussions to uncover insights and steps families can take to create greater engagement and cohesion, scaling and impact in pursuing their philanthropic mission.</p> <p><b>MODERATOR:</b> Melanie Schnoll-Begun   <i>Morgan Stanley</i></p> <p style="text-align: right;"><i>(continued on next page)</i></p>   |

# AGENDA

## THURSDAY | JUNE 23

|                            |  |
|----------------------------|--|
|                            | <p><i>(continued from previous page)</i></p> <p><b>Emily Tow Jackson</b>   Executing Director and President, The Tow Foundation<br/> <b>Glenn Kurlander</b>   Managing Director, Morgan Stanley Wealth Management<br/> <b>Abby Moffat</b>   CEO, The Diana Davis Spencer Foundation<br/> <b>Elizabeth Carlock Phillips</b>   Executive Director, Phillips Foundation<br/> <b>Diana Davis Spencer</b>   President and Chair, The Diana Davis Spencer Foundation</p>   |
|                            | <p><b>E. Scaling 2.0: Transformative Scaling Strategies (Safra Hall)</b></p> <p>In this session we will delve deeply into how to spread and broaden the impact of effective models beyond the footprint of a single organization in order to impact an issue more broadly. The Bridgespan Group has been studying transformative scale approaches for the last three years. Taz Hussein, head of Bridgespan’s public health practice, will share its lessons learned with case studies and frameworks from which to draw. Participants will learn about seven distinct pathways to transformational scale that they can pursue and how to learn more about them including policy change, spreading a practice into thousands of nonprofits, generating demand for program services, and developing public will campaigns.</p> <p><b>PRESENTER: Taz Hussein</b>   Partner and Head of the Nonprofit Practice, The Bridgespan Group</p>  |
| <b>11:15 AM – 11:30 AM</b> | <b>NETWORKING BREAK</b>  |
| <b>11:30 AM – 12:45 PM</b> | <p><b>PLENARY PANEL SESSION</b></p> <p><b>Collective Impact and the Leadership Required to Make it a Success (Safra Hall)</b></p> <p>Collective Impact is an important approach to achieving large-scale impact with increasing numbers of supporters. This plenary panel will take a close look at this model of collaboration and consider what we’ve learned thus far — what has worked and where there is more work to be done. How much do we know about whether this approach is transforming communities and achieving broad outcomes? What are the lessons that can be applied to communities across the country that are attempting various forms of collective impact? Panelists will also discuss hypotheses for how to improve the “collective impact model” and what could help it capture the promise it holds to drive impact. The key ingredient of leadership will be explored throughout the session, including what types of social entrepreneurs are required to enable collective impact implementations to succeed.</p> <p><b>MODERATOR: Fay Hanleybrown</b>   Managing Director, FSG</p> <p><b>Stacy Holland</b>   Executive Director, The Lenfest Foundation<br/> <b>Renee Kaplan</b>   Chief Strategy Officer, The Skoll Foundation<br/> <b>Steve Patrick</b>   Executive Director of the Aspen Forum for Community Solutions<br/> <b>Ken Thompson</b>   Program Officer, Bill &amp; Melinda Gates Foundation</p> |

## THURSDAY | JUNE 23

|                           |   |
|---------------------------|---|
| <b>12:45 PM – 3:00 PM</b> | <p><b>LUNCHEON PLENARY: Scaling Social Impact to Improve the Lives of Women and Girls (Events Hall, 2nd Floor)</b></p> <p><b>KEYNOTE</b> <b>Abigail Disney</b>   Filmmaker, Philanthropist, President and CEO, Fork Films, President and Co-Founder, Daphne Foundation</p> <p><b>Plenary Panel Discussion</b></p> <p>There are many lenses through which we can consider the question of scaled impact: a defined geographic region; a particular program or policy; or a specific problem we seek to address. It is always critical, though, that we think about the population that is to benefit. What does scaled impact mean, or how does our understanding of scaled impact change, for example, when we consider the question through the lens of gender? This lunch plenary will consider the question of scaled impact for women and girls. The conversation will start with a keynote presentation from noted feminist, philanthropist, and filmmaker Abigail Disney, who will offer her perspective on this issue. Then, a panel moderated by journalist and philanthropist Soledad O’Brien will respond to Abigail’s remarks from local, national, and global perspectives and add their own point of view.</p> <p><b>MODERATOR: Soledad O’Brien</b>   Journalist, Philanthropist, Co-Founder, Starfish Foundation</p> <p><b>Holly Gordon</b>   Co-Founder, Girl Rising<br/> <b>Danielle Moss Lee, Ed.D</b>   President and CEO, YWCA of the City of New York<br/> <b>Susan Wefald</b>   Vice President, Programs, Ms. Foundation for Women</p>   |
| <b>3:15 PM – 5:00 PM</b>  | <p><b>FUNDER BRIEFING SESSIONS (Classrooms A/B and C/D)</b></p> <p><b>Organizing Sessions: The Next Step in Taking Action</b></p> <p>To support our goal of making the Conference a forum for engaging funders in new and exciting opportunities to support scaled impact, this year’s agenda includes time for funders to come together to learn about opportunities to participate in collaborative funding activities. All interested funders are welcome to join the sessions described here. Or, if you’ve become inspired to take action with other funders and would like to get the ball rolling, please talk to someone on the Exchange staff. We’ll do what we can to help get another session going! Two of the sessions that are already planned are:</p> <p><b>NYC Early Childhood Convening:</b> where attendees will learn about an exciting new initiative launched by a group of NYC foundations to fund high-impact early childhood education and health initiatives in collaboration with the City and other funders.</p> <p><b>NYC Post Secondary Career Pathways:</b> where attendees will hear about findings from a report on Post Secondary Success in NYC and discuss ways in which funders might collaborate to drive larger impact in this field.</p> <p><b>MODERATOR: Abby Jo Sigal</b>   Executive Director, James and Judith K. Dimon Foundation</p> <p><b>Robert B. Schwartz</b>   Professor Emeritus of Practice in Educational Policy, Harvard Graduate School of Education<br/> <b>Barbara Chang</b>   Executive Director, Office of Workforce Development, Office of the Mayor, City of New York<br/> <b>Angie Kamath</b>   National Executive Director of Social Ventures and Innovation, Per Scholas</p> |