

AGENDA

8:15am Registration and Breakfast

9:00am Opening Remarks

Andrew Jack, Head of Curated Content, *Financial Times*

9:05am Keynote Interview

Judith Rodin, President, *The Rockefeller Foundation*

INTERVIEWER:

Gillian Tett, US Managing Editor, *Financial Times*

9:40am Panel Discussion: Developments in Innovative Finance

As it becomes clear how much funding will be needed to address big global challenges, a cohort of organizations and individuals is developing cutting-edge financial instruments designed to attract institutional investors to large-scale investments that can meet these challenges. These emerging tools include insurance-structured financing mechanisms and new debt instruments designed to raise commercial institutional capital for environmental conservation. Those developing them argue that the dollar-to-dollar impact of these mechanisms could be significantly higher than traditional investment into social enterprise and could unleash billions of dollars to fund social change and help meet the Sustainable Development Goals and other challenges while also delivering attractive returns to institutional investors, pension funds and others.

Barbara Buchner, Executive Director, Climate Finance Program, *Climate Policy Initiative*

Chantal Line Carpentier, Chief, *United Nations Conference on Trade and Development (UNCTAD)*

Saadia Madsbjerg, Managing Director, *The Rockefeller Foundation*

Nancy Pfund, Founder and Managing Partner, *DBL Partners*

MODERATOR:

Stephen Foley, US Investment Correspondent, *Financial Times*

10:20am Panel Discussion: Critical Support for Innovative Finance

New innovative finance models are not easy to get off the ground. They need to be tested and even to fail. Philanthropic funding, which can bear greater risks than private capital, can provide seed funding for experimentation and help build the infrastructure—from knowledge hubs to measurement tools and reporting standards—that underpins the growth of new investment models. Professional assistance is needed for the structuring of social impact bonds, green bonds and other types of innovative financing deals. Meanwhile, the public sector also plays a role through the provision of special funds, incentives for innovation and other initiatives. This panel will examine the different types of support needed to kick-start some of the new investment models.

Richard Kauffman, Chairman of Energy and Finance for New York, *Office of Governor Andrew Cuomo*

Debra Schwartz, Managing Director, *MacArthur Foundation*

Timothy Stiles, Global Chair, International Development Assistance Services, *KPMG*

MODERATOR:

Andrew Jack, Head of Curated Content, *Financial Times*

11:00am Networking Break

11:20am Investment Dialogue

Chid Liberty, Co-Founder, *Liberty & Justice*

Jim Sorenson, Founder, *Sorenson Impact Foundation*

MODERATOR:

Sarah Murray, Specialist Writer on Sustainable Development, *Financial Times*

11:50am Panel Discussion: An Array of New Investment Tools

While investment tools such as impact investing and micro-finance are becoming well understood, a wide range of innovative financing mechanisms is now available to high net worth individual and family offices and others that address social problems such as prison recidivism, homelessness and housing. These tools range from social impact bonds to impact investments. Investment terms and structures may replicate those found in the mainstream investment world, or they may be new arrangements designed to serve a specific function. How do some of these financing mechanisms work? Which have so far shown most promise as sources of finance for social change? Which are most likely to deliver returns – both financial and social or environmental – to investors? Which are currently most readily available as investment vehicles?

Michael Kubzansky, Partner, Intellectual Capital, *Omidyar Network*

Tracy Palandjian, Co-Founder and CEO, *Social Finance*

Ommeed Sathe, Vice-President, Impact Investments Director, Newark Investment Fund, *Prudential Financial*

Lauren Sepolen, Fixed Income Research Analyst, *BNY Mellon Wealth Management*

MODERATOR:

Stephen Foley, US Investment Correspondent, *Financial Times*

12:30pm Luncheon Buffet

INVESTING FOR GOOD

1:30pm Concurrent Discussions

Breakout sessions will focus on how new financing mechanisms could be put to work in tackling different social and environmental challenges.

a) Social impact financing

Remain in the ballroom for this breakout session.

This session will take a deeper dive into the world of social impact financing, social impact bonds, pay-for-performance financing and other mechanisms that are emerging to address social challenges.

Andrea Phillips, Founder & Managing Partner at The Community Outcomes Fund, *Maycomb Capital*

Eric Rosenblum, Lead, Social Impact, *Palantir*

David Wilkinson, Director, Office of Social Innovation and Civic Participation, *The White House*

MODERATOR:

Jeremy Keele, Managing Director, *Sorensen Impact Center*

b) The role of innovative finance in climate change

Apella 207 is located down the hallway past the registration desk.

From green bonds to asset managers and institutional investors taking steps to decarbonize their public equities portfolios or fixed-income funds, investors sit at the confluence of impact and mainstream capital markets. These are actors whom, ultimately, innovative finance solutions need to engage.

Maryam Golnaraghi, Director of Extreme Events and Climate Risks, *The Geneva Association*

Frédéric Samama, Deputy Global Head of Institutional and Sovereign Clients, *Amundi*

Mark Tercek, President and CEO, *The Nature Conservancy*

Uday Varadarajan, Principal, *Climate Policy Initiative*

MODERATOR:

Andrew Jack, Head of Curated Content, *Financial Times*

2:30pm Keynote Interview

John Morton, Senior Director for Energy and Climate Change, National Security, *The White House*

MODERATOR:

Andrew Jack, Head of Curated Content, *Financial Times*

3:00pm Presentation: Planet

A visual presentation of the imaging satellites that will map the earth to better understand global ecosystems

Andrew Zolli, Vice-President, Global Impact Program, *Planet*

3:10pm Panel Discussion: Accountability, Transparency and Measuring Success

Debates are intensifying about accountability and transparency, as well as the value of sharing knowledge about impact and what works and what does not. Measuring the social and environmental impact of investments is not easy. Yet without measurement systems, innovative financing mechanisms will not be able to attract mainstream investors. Meanwhile, donors are also demanding more transparency and accountability from their giving and seek to bring the rigor and discipline of investing to their charitable efforts. What are the measurement systems being developed to help philanthropists and investors gain a clear picture of the impact their money is making? What steps are required to strengthen these systems and establish robust measurement models that will give mainstream investors the confidence to enter markets based on innovative finance? What are the tools, metrics, track records and data now available to help investors match social impact opportunities to the risk, return and impact expectations of a portfolio?

Andrew Kasso, Co-Founder, *B Lab*

Candace Smith, Managing Director of Risk, *MicroVest Capital Management*

Matthew Weatherley-White, Managing Director, *The CAPROCK Group*

Andrew Zolli, Vice-President, Global Impact Program, *Planet*

MODERATOR:

Sarah Murray, Specialist Writer on Sustainable Development, *Financial Times*

3:40pm Keynote Interview

Deborah Winshel, Managing Director and Global Head of Impact Investing, *BlackRock*

INTERVIEWER:

Stephen Foley, US Investment Correspondent, *Financial Times*

4:10pm Closing Remarks

Andrew Jack, Head of Curated Content, *Financial Times*

4:15pm Cocktail Reception

Please join us in the Cube for a special reception hosted by the 2017 FT/IFC Transformational Business Awards.

The coat check will move to the Cube for your convenience.