



## Mission Investing Forum: Building Healthy Communities

Wednesday, July 1, 2009

Forum Sessions: 8:00 am - 5:00 pm

Time	Schedule
8:00 – 8:30 am	<b>Registration &amp; Continental Breakfast</b>
8:30 – 9:00 am	<p><b>Welcome &amp; Introductions</b></p> <p><i>Large and small foundations focused on healthy communities are using a broader range of tools to accomplish mission - leveraging grantmaking with policy initiatives, convening and mission investing. The California Endowment's new strategic vision will take these tools to the community level to focus on prevention and the social determinants of health. As we refine and implement our Building Healthy Communities strategy, we hope to develop strategic partnerships throughout the state and nationally with like-minded investors and funders.</i></p>
9:00 – 10:30 am	<p><b>Module 1: Investor Panel</b></p> <p><i>Representatives of three foundations experienced in mission investing will discuss their organizations' mission, mission investing strategy, and financial and social impact results.</i></p> <p><b>Moderator:</b></p> <ul style="list-style-type: none"> <li>▪ Tessie Guillermo, President &amp; CEO, Zero Divide and Vice-Chair of the Board, The California Endowment</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>▪ William F. McCalpin, Director, F.B. Heron Foundation and Independent Chairman of the Board of Trustees of the Janus Funds</li> <li>▪ Stephen DeBerry, CIO, Kapor Enterprises, Inc. and Board Member of The California Endowment</li> <li>▪ Doug Stamm, CEO, Meyer Memorial Trust</li> </ul>
10:30 – 10:45 am	<b>Break</b>
10:45 – 12:00 pm	<p><b>Module 2: Access to Capital &amp; Wealth Building</b></p> <p><i>The Commission to Build a Healthier America, the World Health Organization, and many others have found a correlation between wealth and income and health outcomes. This session will explore what opportunities exist to use mission investing to improve access to capital, financial services, and asset building. We will also discuss opportunities for collaboration among investors, funders and government with respect to access to capital, financial services, and asset building.</i></p> <p><b>Introduction:</b></p> <ul style="list-style-type: none"> <li>▪ Dan DeLeon, CFO, The California Endowment</li> </ul> <p><b>Moderator:</b></p> <ul style="list-style-type: none"> <li>▪ Betsy Zeidmann, Director, Center for Emerging Domestic Markets, The Milken Institute</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>▪ Nancy Pfund, Managing Partner, DBL Investors</li> <li>▪ Paul Hudson, CEO, Broadway Federal Bank</li> <li>▪ Barbara Vanscoy, Executive VP &amp; Senior Portfolio Manager, Community Capital Management</li> </ul>

<p>12:00 – 1:30 pm</p>	<p><b>Lunch: Investee Panel</b>  <i>The founders of three growing companies will discuss how mission investments and working with mission driven investors have enabled them to scale their businesses while actively promoting healthy communities.</i></p> <p><b>Moderator:</b>  Daniel Boggan, Chairman of the Board, The California Endowment</p> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>▪ Kristin Groos Richmond, Founder &amp; CEO, Revolution Foods</li> <li>▪ Eric Sten, President, Further Development</li> <li>▪ Joshua Bar-Lev, Vice President of Regulatory Affairs, BrightSource Energy</li> </ul>
<p>1:30 – 1:45 pm</p>	<p><b>Break</b></p>
<p>1:45 – 3:00 pm</p>	<p><b>Module 3: Access to Healthy Food</b>  <i>The Centers for Disease Control and Prevention have identified “food deserts” as a key driver in the increasing rates of obesity among America’s urban youth. This session will explore what opportunities exist to use mission investing to help these food deserts bloom with quality, affordable, and accessible fresh food. We will also discuss opportunities for collaboration among investors, funders and government with respect to access to healthy food.</i></p> <p><b>Introduction:</b></p> <ul style="list-style-type: none"> <li>▪ Marion Standish, Program Director, The California Endowment</li> </ul> <p><b>Moderator:</b></p> <ul style="list-style-type: none"> <li>▪ Elwood Hopkins, Managing Director, Emerging Markets, Inc.</li> </ul> <p><b>Panelist:</b></p> <ul style="list-style-type: none"> <li>▪ Jeremy Nowak, PhD, President &amp; CEO, The Reinvestment Fund</li> <li>▪ Arturo Sneider, Partner, Primestor Development</li> <li>▪ Jenna Gulager, City of Los Angeles Community Redevelopment Agency</li> <li>▪ John Talmage, President &amp; CEO, Social Compact</li> </ul>
<p>3:00 – 3:15 pm</p>	<p><b>Break</b></p>
<p>3:15 – 4:30 pm</p>	<p><b>Module 4: Youth Development</b>  <i>Creating healthy communities for the long run requires that we protect and strengthen our youth – in mind, body, and spirit. This session will explore what opportunities exist and to use mission investing to support youth development. We will also discuss opportunities for collaboration among investors, funders and government with respect to youth development.</i></p> <p><b>Introduction:</b></p> <ul style="list-style-type: none"> <li>▪ Ray Colmenar, Senior Program Officer, The California Endowment</li> </ul> <p><b>Moderator:</b></p> <ul style="list-style-type: none"> <li>▪ Lisa Richter, Principal, GPS Capital Partners</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>▪ Marc Johnson, Program Officer, Education, Bill &amp; Melinda Gates Foundation</li> <li>▪ Glenn Pierce, CEO &amp; President, Pacific Charter School Development</li> <li>▪ Tony Berkley, Program Director, W.K. Kellogg Foundation</li> </ul>
<p>4:30 – 5:00 pm</p>	<p><b>Wrap-up and Next Steps</b></p>