

# MORE FOR MISSION: EXPANDING THE FIELD

September 20-21, 2010  
Harvard Kennedy School  
Taubman Building, 5th floor, Nye Room  
15 Eliot Street, Cambridge, Massachusetts

## September 20, 2010

5 – 7 pm                    *Opening Reception*

## September 21, 2010

8 – 9 am                    *Registration and Continental Breakfast*

9 – 9:10 am                *Welcome*

John Haigh, Executive Dean, Harvard Kennedy School

9:10 – 9:30 am            *Framing the Issues*

David Wood, Director, Initiative for Responsible Investment  
Lisa Hagerman, Director, More for Mission  
Angela Brown, Director of Programs, The Hyams Foundation

### *Tackling Key Barriers to Mission Investing*

- *Delivering Returns—Perception and Reality*
- *Relationship with Consultants—Friend or Foe*
- *Building Internal Capacity—Board and CIO Commitment*
- *Innovative Products—Mission Investment Vehicles across Asset Classes*

9:30 – 10:45 am         *Relationship with Consultants—Friend or Foe*

**Moderator:** Michael Lent, Trustee, Edward W. Hazen Foundation

### **Panelists:**

Jenny Russell, Executive Director, Merck Family Fund  
John LaPann, President & Chief Investment Officer, Federal Street Advisors  
Richard Woo, Executive Director, The Russell Family Foundation  
Craig Muska, Investment Advisor, Threshold Group

10:45 – 11:00 am        *Break*

11:00 – 12:15 pm        *Delivering Returns—Perception and Reality*

**Moderator:** Luther Ragin, Jr., Chief Investment Officer, F.B. Heron Foundation

### **Panelists:**

Christa Velasquez, Director of Social Investments, Annie E. Casey Foundation  
Nancy Pfund, Managing Partner, DBL Investors  
Doug Stamm, Chief Executive Officer, Meyer Memorial Trust  
Geeta Aiyer, Founder and President, Boston Common Asset Management

*12:15 – 12:45 pm*      *Lunch*

*12:45 – 1:15 pm*      *Keynote Address*

Sandra A. Urie, President and Chief Executive Officer, Cambridge Associates

*1:30 – 2:45 pm*      *Building Internal Capacity—Board & CIO Commitment*

**Moderator:** Ben Lovell, Trustee, Jessie Smith Noyes Foundation

**Panelists:**

Jim Bildner, Trustee, The Kresge Foundation

Andrea Dobson, Chief Operating and Financial Officer, Winthrop Rockefeller Foundation

Anne Stetson, Trustee, The John Merck Fund

Wayne Pierson, Chief Financial and Investment Officer, Meyer Memorial Trust

*2:45 – 4:00 pm*      *Innovative Products—Mission Investment Vehicles across Asset Classes  
(Fixed Income, Public Equity, Venture Capital, and Real Estate)*

**Moderator:** Belden Hull Daniels, President & CEO, Economic Innovation International

**Panelists:**

Chris McKnett, Vice President, SSgA US Community Investing Index Strategy

David Schroder, President, InvestAmerica Investment Advisors

Barbara Vanscoy, Founder, Community Capital Management

Wendy Rowden, Managing Director, Investments, Jonathan Rose Companies

*4:00 pm*      *Adjourn*

*4:00 – 5:30 pm*      *Closing Reception*