



## Second Vatican Conference on Impact Investing – Making the Year of Mercy a Year of Impact for the Poor

### Conference Agenda

**Crowne Plaza Rome – St. Peter’s**  
**Via Aurelia Antica, 415 | Rome, Italy**

#### SUNDAY, JUNE 26, 2016

3:00 pm – 6:30 pm **Registration**  
*The registration desk will open at 3:00 pm. Please come at your leisure.*

5:30 pm – 6:30 pm **Reception**

6:30 pm – 9:00 pm **Dinner and Welcoming Remarks / Crowne Plaza**  
*Participants welcomed and opening remarks by His Eminence, Cardinal Peter K.A. Turkson.*

*Following dinner will be an armchair discussion of the history of the Catholic Church utilizing enterprise for its social mission and investing in solidarity with the poor.*

**Moderator:** Dr. Carolyn Woo, Catholic Relief Services

**Discussants:** Professor Luigino Bruni, Università di Roma Lumsa

Mr. Mark Steitz, TSD Communications

His Eminence, Cardinal Peter K.A. Turkson, Pontifical Council for Justice and Peace

#### MONDAY, JUNE 27, 2016

6:30 am – 8:30 am **Morning Mass / St. Peter’s Basilica**  
*Participants wishing to join for morning mass will meet in the lobby of the Crowne Plaza at 6:30 am for bus pick up. After mass, a light breakfast will be provided at the Crowne Plaza before the opening of the first day.*

7:00 am – 9:00 am **Breakfast**  
*Participants not attending morning mass to have breakfast at their hotels.*

8:00 am – 9:00 am **Registration**  
*The registration desk will open at 8:00 am. Please come at your leisure.*

9:00 am – 9:05 am **Opening Prayer**  
His Eminence, Cardinal Peter K.A. Turkson, Pontifical Council for Justice and Peace

## **THEME: IMPACT INVESTING – ACHIEVING IMPACT FOR THE POOR?**

### **9:05 am – 9:50 am State of the Sector**

*An overview of current impact investing sector activities and trends.*

**Moderator:** Dr. Patricia Dinneen, Emerging Markets Private Equity Association

**Speakers:** Mr. Amit Bouri, Global Impact Investing Network  
Dr. Charly Kleissner, KL Felicitas Foundation, Toniic

### **9:50 am – 10:20 am Power of Enterprise in Uplifting African Communities**

*A discussion with Dr. Agnes Kalibata on the importance of African-led enterprise as the means to provide uniquely African solutions that will lift communities out of poverty.*

**Moderator:** Mr. John Simon, Total Impact Capital

**Speaker:** Dr. Agnes Kalibata, Alliance for a Green Revolution in Africa

### **10:20 am – 11:05 am Evidence that Impact Investing Benefits the Poor**

*Does impact investing benefit the poor? Review of recent research and/or case studies.*

**Moderator:** Mr. Matt Bannick, Omidyar Network

**Speakers:** Ms. Jacqueline Novogratz, Acumen  
Mr. Vineet Rai, Aavishkaar

### **11:05 am – 11:30 am Break**

### **11:30 am – 12:45 pm Investing Catholic Funds for Impact**

*Examples and opportunities of current and planned investments and strategies by Catholic entities.*

**Moderator:** Mr. Glenn Creamer, Providence Equity Partners

**Speakers:** Rev. Séamus Finn, OMI, Interfaith Center on Corporate Responsibility, OIP Trust  
Dr. Jean-Baptiste de Franssu, Istituto per le Opere di Religione  
Ms. Dale Hunt, Ascension Investment Management  
Fr. Thomas McClain, S.J., General Curia of the Society of Jesus

### **12:45 pm – 1:30 pm Successful Social Enterprises**

*A discussion of what makes for a successful social enterprise (e.g. mission, business model, metrics, and scale).*

**Moderator:** Mrs. Agnes Dasewicz, U.S. Agency for International Development

**Speakers:** Dr. Laurence Brahm, Shambhala Serai Group  
Mr. Kola Masha, Babban Gona, Doreo Partners

### **1:30 pm – 2:30 pm Lunch**

## **THEME: ACHIEVING SUSTAINABILITY IN SERVING THE POOR – TRANSITION FROM SOCIAL PROGRAM TO SOCIAL ENTERPRISE**

### **2:30 pm – 3:30 pm When Should Social Programs Transition to Social Enterprise?**

*A big picture discussion of what conditions social programs should meet when deciding whether to evolve into social enterprise.*

**Moderator:** Ms. Mitchell Strauss, Overseas Private Investment Corporation

**Speakers:** Sir Fazle Hasan Abed, BRAC  
Mr. Nicholas Colloff, Argidius Foundation  
Mr. Aleem Walji, Aga Khan Development Network

- 3:30 pm – 4:15 pm **How to Make the Enterprise Transition**  
*A discussion of how to move from social program to social enterprise, including the internal journey of leadership, external shifts in organization activities, and the importance of change management.*  
**Moderator:** Mr. Kevin Farrell, Farrell Mudd Development  
**Speakers:** Mr. Salvatore Giambanco, Omidyar Network  
Ms. Clara Miller, Heron Foundation
- 4:15 pm – 4:45 pm **Break**
- 4:45 pm – 5:30 pm **Climate Investing**  
*A discussion of innovative models for financing climate smart enterprises and initiatives.*  
**Moderator:** Ms. Margie Sullivan, Sullivan Strategy  
**Speakers:** The Honorable John Delaney, U.S. House of Representatives  
Dr. Ellen Dorsey, Wallace Global Fund
- 5:30 pm – 6:15 pm **Parallel Sessions:** choose 1 of 4 concurrent sessions
- 1. On the Journey – Emerging Enterprises.** *Examples of social programs beginning the transition to social enterprise within CRS' program areas of agriculture and water.*  
**Speakers:** Dr. Shaun Ferris, Catholic Relief Services  
Mr. Paul Hicks, Azure, Catholic Relief Services
  - 2. Investing to Create a Sustainable Future.** *An exploration of the various types of capital – from philanthropic to fully commercial – being deployed around the world by impact-oriented investors to scale enterprises capable of using the power of business to deliver positive environmental and social impact.*  
**Speakers:** Ms. Audrey Choi, Morgan Stanley  
Mr. Matthew Patsky, Trillium Asset Management
  - 3. Technology to Enable Impact Investors.** *An overview of new technology platforms to connect impact investors with opportunities and promote investor collaboration.*  
**Speakers:** Ms. Joan Larrea, Convergence Blended Finance  
Dr. Audrey Selian, Artha Initiative, Rianta Capital Zurich
  - 4. Church Background and Structure.** *A primer on the structure of the global Catholic Church with an emphasis on entities and actors within the Church to engage on issues of impact investing and social enterprise.*  
**Speakers:** Mr. Sean Callahan, Catholic Relief Services  
Mr. Michel Roy, Caritas Internationalis
- 6:15 pm – 7:00 pm **Reception / Crowne Plaza**
- 7:30 pm – 9:00 pm **Dinner / Ristorante Arturo**  
*After the reception, participants to meet at Ristorante Arturo for dinner. Located next to the Crowne Plaza at: Via Aurelia Antica, 413, 00165 Rome, Italy.*

## TUESDAY, JUNE 28, 2016

7:30 am – 8:30 am **Mass**

8:00 am – 9:00 am **Breakfast**

*Participants to have breakfast at their hotel before the opening of the second day.*

9:00 am – 9:05 am **Opening Prayer**

**His Eminence, Cardinal Peter K.A. Turkson**, Pontifical Council for Justice and Peace

9:05 am – 9:15 am **Reflections on the First Day**

**Speaker:** **Dr. Carolyn Woo**, Catholic Relief Services

### THEME: CAPITAL SOURCES AND MEASUREMENT FOR SOCIAL IMPACT

9:15 am – 9:45 am **Sources of Capital and the Enterprises in which They Invest**

*Presentation on different sources of capital, their expectations, and their fit with different types / stages of enterprises.*

**Speaker:** **Mr. John Kohler**, Santa Clara University

9:45 am – 10:45 am **Examples of Capital Providers**

*Panel of capital providers discussing their role in benefiting the poor: what they provide, their expectations, and how social enterprises can appeal to them.*

**Moderator:** **Dr. Roger Huang**, Mendoza College of Business, University of Notre Dame

**Speakers:** **Mr. Graham MacMillan**, Ford Foundation  
**Ms. Jennifer Pryce**, Calvert Foundation  
**Mr. Michael P. Sommer**, BANK IM BISTUM ESSEN eG

10:45 am – 11:15 am **Break**

11:15 am – 12:15 pm **Measurement for Social Impact**

*A discussion of leading actors' efforts to measure the social performance of enterprises having an impact on the poor.*

**Moderator:** **Ms. Jeri Eckhart Queenan**, The Bridgespan Group

**Speakers:** **Ms. Olivia Muiru**, B Lab  
**Ms. Dimple Sahni**, Anthos Asset Management

12:15 pm – 1:15 pm **Learning Tables**

*Begins with 15-minute introduction and splitting groups into breakout rooms. Experts in impact investing and social enterprise are placed in small groups (3-4) with learning audience members. Experts and learners introduce themselves, discuss objectives of the conference, and rotate every 15 minutes for 3 rounds.*

1:15 pm – 2:15 pm **Lunch**

## THEME: ENTERPRISE TO IMPROVE LIVES AND LIVELIHOODS

2:15 pm – 3:00 pm **Parallel Sessions:** choose 1 of 4 concurrent sessions

1. **Mobile Communications Technology as an Enabler of Social Enterprise.** *A discussion of how mobile communications technology can be utilized by entrepreneurs to reach new customers at the base of the pyramid and a vision for its use to create new social enterprises.*  
**Speaker:** Mr. Michael Quinn, Zoono
2. **Climate Enterprise – Energy.** *A discussion on how successful enterprise can positively impact the environment and the poor.*  
**Speaker:** Mr. Ned Tozun, d.light
3. **Women’s Entrepreneurship.** *A discussion on how to create an enabling environment for women’s entrepreneurship and its impact.*  
**Speakers:** Ms. Mary Mwangi, Aspen Network of Development Entrepreneurs  
Ms. Laurie Spengler, Enclude
4. **Youth Entrepreneurship.** *A discussion on how to create an enabling environment for youth entrepreneurship and its impact.*  
**Speaker:** Ms. Julie Hammerman, JLens Investor Network

3:15 pm – 4:15 pm **The Importance of Talent and Capacity Building**

*A discussion of the importance of talent in sustainably operating and making social enterprises investible and examples from Church and non-Church entities building the capacity of these mission aligned enterprises.*

**Moderator:** Mr. Randall Kempner, Aspen Network of Development Entrepreneurs  
**Speakers:** Ms. Gisele Henriques, Catholic Agency for Overseas Development  
Mrs. Laura Stopponi, Caritas Italy

4:15 pm – 4:45 pm **Break**

## CONFERENCE WRAP-UP

4:45 pm – 6:15 pm **Discussion and Summary of Next Steps**

*Small group work and a summary of the takeaways and next steps as they relate to the conference theme.*

6:15 pm – 6:30 pm **Thank you and Closing Prayer**

**His Eminence, Cardinal Peter K.A. Turkson, Pontifical Council for Justice and Peace**

7:30 pm – 10:00 pm **Closing Dinner / Crowne Plaza**

**WEDNESDAY, JUNE 29, 2016**

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| All Day | <b>Feast of St. Peter and St. Paul</b><br>St. Peter's Square                                    |
| Morning | <b>Special Mass with the Holy Father<br/>His Holiness, Pope Francis</b><br>St. Peter's Basilica |