

# CONVENING AGENDA

Impact & Sustainable Finance | FACULTY CONSORTIUM AT KELLOGG

## DAY ONE THURSDAY, JUNE 22

### Morning Plenary Sessions | White Auditorium

8:30 – 9:00 AM Breakfast & Networking

9:00 – 9:30 AM Welcome, Overview of the Convening, & Member Introductions

9:30 – 10:30 AM Deans' Panel: Future of Sustainable Finance in Academia

**Moderator** Megan Kashner, Northwestern University  
**Presenter** Francesca Cornelli, Northwestern University  
**Presenter** Andrew Karolyi, Cornell University  
**Presenter** Mariëlle Heijltjes, Maastricht University

*Impact and sustainable finance is increasingly a priority at the highest levels of school leadership. This panel of deans will discuss how their schools are approaching sustainable finance, shifts in student and employer demand, the future of curriculum, and the current political environment.*

10:30 – 11:00 AM Developments in Academic Research on Impact and Sustainable Finance

**Moderator** Caroline Flammer, Columbia University  
**Presenter** Hao Liang, Singapore Management University

*What is the current state of academic research? Our teaching is strengthened by incorporating research that has become foundational to the field, understanding how the latest findings are shifting consensus, and appreciating the questions still under debate by academics.*

11:00 – 11:15 AM Transition & Break

### Morning Breakout Sessions | Rooms 2110, 2120, 2130

11:15 – 12:15 PM Breakouts

#### 2110 Early-Stage and Private Impact Capital

**Session Leadership:** Priya Parrish

*We will discuss the major changes occurring in early-impact capital and other private markets, with a focus on shifting definitions and impact investment strategies, rates of return, viability of exit, and where it looks there might be high potential future developments.*

#### 2120 Playful Learning and Sustainable Finance

**Session Leadership:** Ortenca Kume, Gustavo Loiola, Jeffrey Rosen

*This session will focus on innovative impact and sustainable finance pedagogy emerging from the UN PRME i5 program which combines cognitive skill set training with creative, emotional, social, and physical skill set training. Session leaders will discuss how they have used these approaches in the classroom to shape responsible managers who lead holistically.*

#### 2130 Redirecting Capital to Address Racial Equity

**Session Leadership:** Eric Horvath, Bhakti Mirchandani, Randy Strickland

*Croatan Institute defines racial equity investing as "the practice of redirecting capital to support communities of color with an explicit objective of increasing financial and economic inclusion and dismantling systemic and institutional racism, both in measurable ways." This session will explore how inequality is not only a moral issue but a systemic risk, and describe practical ways investors can use the capital markets to shift power for the greater good.*

### Lunch | White Auditorium

12:15 – 1:15 PM Lunch

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## Afternoon Breakout Sessions | Rooms 2110, 2120, 2130

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1:15 – 2:15 PM

Breakouts: Round Two

### 2110 Green Taxonomies in the Global South

**Session Leadership:** Lauro Gonzalez, Luis Gabriel Morcillo, Jacob Park, Chul Woo Moon

*Green taxonomies are emerging and being adopted on the basis of local expertise and need. This session will look at four different cases of the adaptation and creation of different taxonomies and sustainability finance approaches in different geographic contexts.*

### 2120 Measuring and Managing Enterprise Impact and Incorporating Stakeholder Voice

**Session Leadership:** Sara Minard, Karen Wilson

*In this session, we'll continue our discussion of approaches to teaching impact measurement and management. We will dive deeper into using the impact management platform as a teaching tool, and discuss the incorporation of stakeholder voice when determining impact.*

2:15 – 2:30 PM

Transition & Break

## Afternoon Plenary Sessions | White Auditorium

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2:30 – 3:30 PM

### Practitioner Perspectives: Changing Landscape and Evolving Demand for Talent

*As the industry continues to mature, we take stock on where organizational and functional growth is occurring, where investment flows are and should be increasing, and what this tells us about the evolving demand for talent and education.*

**Moderator** Lloyd Kurtz, Northwestern University  
**Presenter** Ingrid Dyott, Neuberger Berman (formerly)  
**Presenter** Gil Crawford, Microvest Capital Management  
**Presenter** Liqian Ma, Cambridge Associates

3:30 – 4:15 PM

### The Path Forward for Private Capital Markets: Strategies for Scale

*Private capital gave impact investing and sustainable finance its start, but its pace of growth isn't matching need or opportunity. This panel will discuss the path forward in private capital and how we unlock further scale.*

**Moderator** Sue Carter, Yale University  
**Presenter** Greg Fischer, BCG  
**Presenter** Heidi Patel, ReThink Capital  
**Presenter** Mark Tercek, Centerview Partners

4:15 – 5:00 PM

### The Path Forward for Public Capital Markets: Systems-Level Change

*The current 'menu' of approaches to sustainable investing in public markets doesn't rise to the level of market or systems change. What emerging practices have the potential to create deeper change, and what is the role for policy and for education?*

**Moderator** Caroline Flammer, Columbia University  
**Presenter** William Burckart, Investment Integration Project  
**Presenter** Lloyd Kurtz, Montecito Bank and Trust

5:00 – 5:15 PM

Concluding Discussion

## Thursday Dinner & Drinks | Firehouse Grill

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5:30 – 6:30 PM

Open Bar

6:30 – 9:00 PM

Dinner

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## DAY TWO FRIDAY, JUNE 23

### Morning Plenary Sessions | White Auditorium

**8:30 – 9:00 AM** Breakfast & Networking

**9:00 - 9:15 AM** Day Two Overview & Announcement

**9:15 - 10:15 AM** The State of Sustainability Standards

*Rapidly-developing standards are at the cusp of upending the field. What is the current state of standards? How are developments likely to affect asset managers and organizational leaders? In what ways might standards be counter-productive, and how do social outcomes fit into the frameworks?*

**Moderator** Dave Chen, Northwestern University

**Presenter** Janine Guillot, Sustainability Accounting Standards Board (formerly)

**Presenter** John Hoepfner, LGIM America

**10:15 – 10:45 AM** Networking Break

**10:45 – 11:45 AM** Markets & Valuations for Natural Capital

*We have reached an inflection point in the valuation and development of markets for natural capital. What is the state of play, what key questions remained to be answered, and what is ready for the classroom?*

**Moderator** Jaap Bos, Maastricht University

**Presenter** Dave Chen, Equilibrium Capital

**Presenter** Eric Letsinger, Quantified Ventures

**Presenter** Gabe Sheets-Poling, Ripple

**11:45 – 12:00 PM** Transition & Break

### Lunch | East Terrace

**12:00 – 1:00 PM** Lunch

### Afternoon Breakout Sessions | Rooms 2110, 2120, 2130

**1:15 – 2:15 PM** Breakouts

#### 2110 Capitulo LatAm

**Session Leadership:** Vanessa Bedoya Becerra

*Join us for a gathering of Capitulo LatAm, a sub-chapter of the Impact and Sustainable Finance Faculty Consortium. Capitulo LatAm is comprised of members focused on Latin America in their work. This meeting will look at Capitulo LatAm's contributions and cover current and future projects.*

#### 2120 Impact in the Boardroom: Getting Beyond ESG

**Session Leadership:** Rosemary Addis, Mary Margaret Frank

*An interactive session exploring key themes of governance, stewardship and decision-making for impact. Why governance and stewardship? What is good practice? How do we build this capability in directors and decision-makers? What are the practical implications and key challenges?*

**2:15 – 2:30 PM** Transition & Break

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## Afternoon Plenary Sessions | White Auditorium

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**2:30 – 3:30 PM**

### **Net Zero in Action**

*Net Zero pledges are too often matched by an absence of meaningful progress or even a viable plan. What are the elements of a best-in-class Net Zero pledge? What examples exist at the intersection of finance and management? What lessons does that have for the classroom?*

**Moderator** Rob Bauer, Maastricht University  
**Presenter** Nando van Kleeff, Laudes Foundation  
**Presenter** Louise Kranenburg, Pensioenfonds Detailhandel

**3:30 – 4:30 PM**

### **A Just and Equitable Transition**

*A transition to a zero or low-carbon world could reinforce structural disadvantages or create new inequities for workers, consumers, and communities, especially in certain sectors, countries, and regions. As the finance community increasingly embraces climate goals, how should it consider the social costs and consequences of the transition?*

**Moderator** David Wood, Harvard University  
**Presenter** Jake Barnett, Wespath  
**Presenter** Vonda Brunsting, Harvard University  
**Presenter** Douglass Sims, NRDC  
**Presenter** Carlos Alberto Vargas, Tecnológico de Monterrey

**4:30 – 5:00 PM**

### **Concluding Discussion**

**5:00 PM**

### **Dismissal**