



FOUNDATION INVESTING 2.0

MASTER CLASS: From Intent to Action: Setting the Foundations for Impact and Responsible Investing

This in-person master class at the [SHARE Investor Summit](#) February 19, 2020 in Vancouver, BC is designed for foundations looking to get started or further develop their approaches to impact and responsible investing. The workshop will examine the importance of investment beliefs as building blocks for your total portfolio strategy. We will also explore best practices in developing policies and governance frameworks, how to work with your managers, identifying impact opportunities, and possible quick wins. Participants will leave ready to take the next steps on their impact and responsible investing journey.

[REGISTER](#)

DATE:

WEDNESDAY, FEBRUARY 19, 2020
9:30AM – 3:30PM

LOCATION:

Port of Singapore Room,
Pinnacle Hotel Vancouver Harbourfront
1133 West Hastings Street
Vancouver, BC, V6E 3T3

EVENT PARTNERS:



CONFIRMED SPEAKERS AND FACILITATORS

Brodie Guy, Executive Director, Coast Funds

Andrea Nemtin, Executive Director and Partner, Rally Philanthropy

Shannon Rohan, Chief Strategy Officer, SHARE



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AGENDA

9:30 Registration / Light breakfast

10:00 Welcome and Introductions

10:30 Impact and Responsible Investing Overview

This session will provide a brief overview of impact and responsible investment strategies as well as the latest market trends and drivers. The facilitators will also provide the latest research and evidence to help address common concerns related to impact and responsible investing.

11:00 Storytelling: Getting the Foundations Right

Hear from a fellow foundation about the initial steps they took to establish a strong governance framework for their impact and responsible investing activities including some of the key lessons along the way.

11:30 Break

11:45 Investment Beliefs: Foundations for Decision-Making and Governance

This session will look at some key first steps for foundations, including considering the role of investment beliefs in providing a basis for organizational decision-making on impact and responsible investing, as well as implementation and alignment with service providers.

12:30 LUNCH

1:30 Storytelling: Delivering Impact in Public Markets

Hear from Coast Funds about efforts to ensure their proxy voting rights were being used in a way that aligned with their broader values and expectations, particularly regarding Indigenous rights and reconciliation.

2:00 Implementing a Total Portfolio Approach to Impact and Responsible Investing

This session will explore different impact and responsible investment strategies, and address questions such as: how do we identify impact opportunities, what are some viable first steps, and how do we work effectively with our asset managers?

2:30 Break

2:30 Small Group Discussions

This will be an opportunity to connect with and learn from each other in a small group setting. Work together to identify common barriers and ways that these may be overcome, as well as resources and support that you will need to help continue your journey.

3:30 Closing