

## JEWISH IMPACT INVESTING SUMMIT 2020

### PARTNERS



JLens is hosting the second Jewish Impact Investing Summit virtually on May 18 & 19, 2020 from 12-3pm EST both days. Join stewards of Jewish communal capital to learn how to engage more deeply in impact investing. The first Jewish Impact Investing Summit was a resounding success thanks to 15 partners, 43 speakers, and 300 attendees representing 82 Jewish organizations. The first Summit focused on the many reasons “why” the Jewish community should engage in impact investing. This second Summit will transition from the “why” to the “how” of impact investing, uniquely framed for the Jewish community.

#### MONDAY, MAY 18 AGENDA (12-3PM EST)

- 12-12:50pm - Moving from Why to How: Jewish Institutions Discuss Impact Investing Challenges & Successes
- 1-1:50pm - New Multifaith Collaborations in Impact Investing
- 2-2:50pm - Grants vs. Loans: Jewish Organizations Explore Impact Investments

#### TUESDAY, MAY 19 AGENDA (12-3PM EST)

- 12-12:30pm - Jewish Communal Representation in the Economic Arena: An Update on JLens' Advocacy
- 12:30-12:50pm - Address: Professor Jeffrey Sachs, UN Sustainable Development Solutions Network
- 1-1:50pm - Business & Investment to Further Peacebuilding and Coexistence
- 2-2:30pm - A Jewish Organization's Journey to Impact Investing in Israel
- 2:30-3pm - The Hardest Part of the How: Impact Measurement

*Agenda and speakers subject to change.*

#### Day 1 – MAY 18, 2020

##### 12-12:50pm: Jewish Institutions Discuss Impact Investing Challenges and Successes

As values-based investing becomes mainstream, some Jewish institutions have led the way in bringing Jewish representation to this important movement. Hear from a panel of senior executives and lay leaders whose organizations have taken significant strides in their impact investing journey, and learn from their challenges and successes how your institution can further its mission through its endowment and investment capital.



**Beth Sirull** is President and CEO of the Jewish Community Foundation of San Diego (JCFSD) which manages over \$570 million in philanthropic assets for organizations and individuals. JCFSD recently became the first Jewish Community Foundation in the United States to offer its donors an impact investment option aligned with Jewish values across multiple asset classes. JCF is also unique in empowering its donors to invest in local impact investment funds for impact in San Diego. Prior to joining JCFSD, Beth served as President/CEO of Pacific Community Ventures (PCV), a combined for-profit/nonprofit impact investing organization whose mission was to create jobs and economic opportunities in low income communities.



**Kathryn Gonnerman** is the Vice President of Philanthropy at the Jewish Community Foundation of Greater Hartford. She has served on the JCF leadership team since December 2013, first as the Marketing and Communications Director and then directing the Center for Innovative Philanthropy. She also served with distinction as Interim CEO in 2018. Before JCF, Kathryn ran Development Operations and served in marketing roles at the California Community Foundation in Los Angeles, which has \$1.8 billion in assets. She earned her master's and bachelor's degrees in East Asian Studies at Yale University and is a certified leadership coach. The Hartford Business Journal named her a member of their "40 Under 40" in 2016.



**Charlene Seidle** is the Leichtag Foundation's Executive Vice President. Charlene won the 2013 JJ Greenberg Memorial Award, an international prize given to one outstanding philanthropic professional under the age of 40 each year. Charlene is a frequent speaker, presenter and writer about topics pertaining to philanthropy, Jewish community trends and social change. She is on the board of the Jewish Funders Network, formerly served on the board of San Diego Grantmakers and has served on many committees and councils. Charlene spent 18 years working for the Jewish Community Foundation of San Diego in increasingly responsible positions including serving as President and CEO of the organization.



**Geoff Gerber** is chair of the investment committee of the Jewish Federation of Greater Pittsburgh. Geoff is also the Chief Investment Officer of TWIN Capital, which he founded in 1990, overseeing the entire quantitative investment process and general management of the firm. He participates in a number of foundations' investment committees and boards including the Burroughs Wellcome Foundation, the Jewish Federation of Greater Pittsburgh and the Jewish Healthcare Foundation. Geoff earned a Ph.D. in Finance and Economics from the University of Pennsylvania, and a B.A. in Economics from the State University of New York at Buffalo.



**Julie Hammerman** founded JLens in 2013 to bring Jewish wisdom and leadership to the influential values-based investing movement. Julie oversees JLens' educational, advisory, and Jewish-values aligned investment strategies. Prior to JLens, Julie was the Impact Investment Strategist at a multi-family office where she implemented customized impact portfolios. Julie began her career in investment banking and later private wealth management at JPMorgan. She was on the founding team of a for-profit social enterprise focused on women's health. Julie received her MBA from Harvard Business School and her BA in Economics from Tufts University. She is a Wexner Foundation Jewish Heritage alum, an UpStart incubator graduate, and proud recipient of the Jewish Community Relations Council's Innovative Leadership Award.

## 1-1:50pm EST: New Multifaith Collaborations in Impact Investing

Impact investing has become a key arena for multifaith collaboration. Faith leaders led the creation of the modern responsible investing movement four decades ago, and they remain respected leaders of the movement today. Learn about the expanding arena of Islamic finance, the founding of the Catholic Impact Investing Collaborative, and the new multifaith organization FaithInvest. Explore ways the Jewish community can claim a seat at the table and further these important collaborations.



**Kavi Chawla's** career is at the intersection of faith, finance, and impact. As a Partner in Bâton Global, Kavi leads the firm's strategy and advisory work with financial services institutions, including in the Islamic and sustainable finance industries. Kavi is also an Investment Partner in Impact Investment Partners, a London-based, FCA regulated impact investing management and advisory firm. Kavi's academic research is focused on the role of leadership and organizational structure in defining and enabling organizations to deliver impact. Kavi has an MBA from the University of Chicago, a Masters in International Affairs from Columbia University, and a BA from Drake University.



**John O'Shaughnessy**, Catholic Impact Investing Collaborative. John is Chief Executive Officer & CFO of the Franciscan Sisters of Mary, a Roman Catholic congregation of women religious in St. Louis, and during his 28 years with the Sisters, he has served as financial advisor to several other Catholic congregations. John founded the Catholic Impact Investing Collaborative in 2014 and is a board member and treasurer of the Global Catholic Climate Movement. He earned a BSBA from the University of Missouri-St. Louis, is a licensed Certified Public Accountant and was previously a Registered Investment Advisor. John is an avid handball player and student of contemplative prayer.



**Nana Francois** comes with a wealth of professional banking and investments experience. Prior to joining FaithInvest as the Membership Director, Nana worked at Gartmore Investment Management, JP Morgan and Barclays Africa, spending 7 years in South Africa before returning to the UK. Her career has spanned many aspects of financial services including alternative investment, developed and emerging markets equities and heading corporate strategy. She has a heart for making money do good (as a trustee in the Finance Innovation Lab) and a heart for doing good with money (as a supporter of the Women's DNA fund investing in the missing middle to make sustainable SMEs more scalable and impactful).



**Rabbi Jacob Siegel**, as Director of Engagement for JLens, works directly with Jewish communities to bring Jewish leadership into the global impact investing arena and helps guide Jewish institutions at every stage of the impact investing process. Jewish tradition has a wealth of wisdom to offer when we consider investment decisions, and Rabbi Siegel and JLens put that wisdom to work to improve the world. Prior to his role at JLens, Rabbi Siegel served as a Jewish educator with a number of different organizations, addressing issues including sustainability and social justice. Rabbi Siegel received his rabbinic ordination from Yeshivat Chovevei Torah, a modern Orthodox rabbinical school in New York, his undergraduate degree in mathematics from Washington University in St. Louis, and he spent a year at Israel's Pardes Institute.

## 2-2:50pm: Grants vs. Loans: Jewish Organizations Explore Impact Investments

Coronavirus has radically changed the needs of Jewish organizations. While the Jewish community has thought extensively about our philanthropic giving to mission organizations, there remains tremendous potential for our endowment and investment capital to further this work. This session will explore several innovative efforts to leverage investment capital to support Jewish mission organizations.



**Robyn Polansky Morrison:** working at the intersection of money and meaning has been a career-long pursuit for Robyn Polansky Morrison, founder and lead principal of Morr Strategy LLC. Morr is an independent and impartial specialist providing advice and solutions execution on a range of matters from wealth management strategy and financial advisor evaluation, investment due diligence and financial literacy, to impact investing and philanthropy. Morrison has over 20 years of pertinent experience collaborating with individuals, families, foundations and institutions. As a passionate advocate of mission-driven causes, Morrison is engaged in numerous philanthropic activities and serves on several non-profit boards and committees, now serving as CoHead of Impact Investing at UJA Federation of New York.



**Alexandra Roth-Kahn** is the Managing Director of the Caring Department at UJA-Federation of New York. In this capacity, Alex advances the organization's commitment to ensure that those struggling with life's challenges are supported by the Jewish community. Alex develops new models of care to respond to these challenges and stimulates innovation in the field. Alex graduated from Brandies University with a BA in Sociology and Judaic Studies. She participated in a year-long fellowship at the Drisha Institute for Jewish Education, in Manhattan, and received her MSW from Columbia University. Alex was a fellow in the Muehlstein Institute for Jewish Professional Leadership at Columbia University, and currently sits on the board of Westchester Day School.



**Sam Marks** is CEO of FJC – A Foundation of Philanthropic Funds, a boutique public charity that offers a diverse menu of philanthropic services to a range of stakeholders, including donor advised funds and fiscal sponsorships. Sam comes to FJC from his role as executive director of the New York City office of Local Initiatives Support Corporation (LISC NYC) which supports local champions to advance equitable development of historically underinvested neighborhoods. Before joining LISC NYC he was Vice President at the Deutsche Bank Americas Foundation, and director of housing development at WHEDCo. Earlier in his career he founded Breakthrough New York, a youth development program.



**Rabbi David Rosenn** is the Executive Director of the Hebrew Free Loan Society, where he oversees a wide range of interest-free loan programs designed to increase financial stability and economic opportunity for lower-income New Yorkers of all backgrounds. Before joining HFLS, Rabbi Rosenn served as Executive Vice President of The New Israel Fund, the largest funder of social change nonprofits in Israel. Previously, he was Founder and Executive Director of AVODAH: The Jewish Service Corps, a year-long full-time anti-poverty program with sites in New York, Chicago, New Orleans and Washington, D.C. Rabbi Rosenn graduated from Harvard University. He was ordained by the Jewish Theological Seminary of America (JTS) in 1997.

## DAY 2 – MAY 19, 2020

### 12-12:30pm: Jewish Communal Advocacy in the Responsible Investing Arena

The responsible investing movement now represents 25% of all professionally managed assets worldwide (over \$22 trillion). In this influential arena, other faith groups are active, young people are engaged, and Jewish communal concerns regularly come into play. JLens represents Jewish communal concerns in the responsible investing arena including religious coexistence, combatting anti-Semitism and religious discrimination, and support for Israel/countering the BDS campaign. JLens' advocacy is enabled by investments from nearly two dozen Jewish institutions in the Jewish Advocacy Strategy, a strategy that invests through a Jewish values lens and builds long-term advocacy relationships with the largest US public companies. This session will explore the vital need for Jewish communal representation in the responsible investing movement.



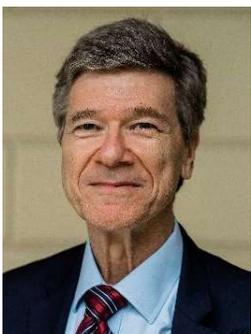
**Rachel Cohen** oversees JLens' Jewish-values aligned corporate research and rankings on issues of concern to the Jewish community. Rachel's methodology is the foundation for JLens' "Most Kosher Company" annual CSR awards. Previously she worked in ESG (Environment, Social, Governance) Consulting at MSCI. Prior to MSCI, Rachel spent two years as a corporate sustainability consultant. She began her career as a Jewish professional at the OSU Hillel. Rachel holds a M.A. in Middle East Studies from Ben-Gurion University, a M.A. in Public Policy & Philosophy with a concentration in Public Health from George Washington University, and a B.A. in Political Science from the Ohio State University with a minor in Jewish Studies from Hebrew University in Jerusalem.



**Rabbi Joshua Ratner** oversees JLens' advocacy in the corporate and investment arena on areas of concern to the Jewish community including social, environmental, Israel, and religious coexistence. Rabbi Ratner speaks regularly with companies and institutional investors to advance Jewish concerns in the responsible investing arena. He previously served as the director of the Jewish Community Relations Council in Connecticut, the Associate Rabbi at Yale University, and the Rabbi at Congregation Kol Ami. Rabbi Ratner is a board member of Hazon, a Global Justice Fellow with American Jewish World Service, and a Rabbinic Fellow of CLAL's Rabbis Without Borders program. Rabbi Ratner was ordained by the Jewish Theological Seminary and is a graduate of Columbia University and Columbia Law School.

### 12:30-12:50pm: Address: Professor Jeffrey Sachs

Professor Jeffrey Sachs, one of the world's leading experts on sustainable development and the fight against poverty, will offer an address to the Jewish community on the importance of values-based investing.



**Professor Jeffrey D. Sachs** is Director of the Center for Sustainable Development at Columbia University, where he directed the Earth Institute from 2002 until 2016. He is also Director of the UN Sustainable Development Solutions Network and a commissioner of the UN Broadband Commission for Development. He has been advisor to three United Nations Secretaries-General, and currently serves as an SDG Advocate under Secretary-General António Guterres. He spent over twenty years as a professor at Harvard University, where he received his B.A., M.A., and Ph.D. degrees. Sachs was twice named as Time magazine's 100 most influential world leaders, and was ranked by The Economist among the top three most influential living economists.

## 1-1:50pm: Business & Investment to Further Peacebuilding and Coexistence

Today we face a significant level of human conflict around the world. At the same time, impact investing is increasingly used to address a wide variety of global challenges. This session will explore the use of impact investing and corporate social responsibility to heal divides, alleviate conflict, and create shared purpose. While conflict regions are sometimes considered high-risk areas for investors to avoid, there is a critical role to be played by thoughtful impact investors, innovative companies, and courageous entrepreneurs to lay the economic foundation for conflict resolution and peace.



**Douglas Krikler** joined the Portland Trust as CEO in October 2018. Most recently, Doug spent six years as Group Development Director and Advisor to the Global MD of Investec Bank Plc. From 2005-2012 Doug was CEO of the United Jewish Israel Appeal (UJIA) where he led the UK Jewish Community's engagement with Israel. Earlier, he was the founding Executive Director of the Maimonides Foundation, promoting cooperation between Muslims and Jews in the UK and Middle East, and Arab-Israel dialogue. Doug has a Masters degree in Middle East Area Studies from the London University School of Oriental and African Studies and a degree in Modern Arabic Studies from the University of Leeds. He spent a year at Ain Shams University in Cairo and speaks Arabic, Hebrew and French.



**Zika Abzuk** leads Cisco's initiative of Country Digitization Acceleration in Israel. Formerly, Zika led Cisco's Corporate Social Responsibility efforts in Eastern Europe, Israel, Palestine, and sub-Saharan Africa. In December 2010, Cisco received the Award for Corporate Excellence (ACE) from the U.S. State Department for Zika's team's work in Israel and Palestine. The Marker Magazine listed Zika as one of Israel's 100 most influential people (#37 and #87). Zika initiated the Cisco Networking Academy Program in Israel and Palestine along with various other projects in Europe, the Middle East, and Africa. She holds a Masters degree in Mathematics from Tel Aviv University.



**Kelly Goodejohn** leads the Starbucks' strategy and governance of its ethical sourcing programs, including C.A.F.E. Practices for coffee, Cocoa Practices, and Supplier Social Responsibility program for manufactured goods. Goodejohn and her team implement Starbucks ethical sourcing programs throughout the company's global procurement organization and apply a comprehensive set of environmental, social, and economic best practices to guide the company's responsible buying practices. The programs focus on continuous improvement and capacity-building, including the Farmer Loans program. Goodejohn and her team engage with many organizations to support the ambition of developing our supplier partners. Goodejohn is a member of the SCAA Sustainability Council and the NCA Sustainability Task Force.



**Sheldon Himelfarb** is the President and CEO of PeaceTech Lab (formerly a part of the US Institute of Peace, now an independent nonprofit). Sheldon came to USIP from The Corporate Executive Board, where he was on the Technology Practice Leadership Team. Prior to this, he served as foreign policy adviser to a member of the Senate Foreign Relations Committee, and the CEO/Executive Producer for Common Ground Productions, the media division of Search for Common Ground. He has managed peacebuilding programs in numerous conflicts, including Bosnia, Iraq, Angola, Liberia, Macedonia, and Burundi and received the Capitol Area Peace Maker award from American University. He holds a doctorate from Oxford University and a bachelor's degree in political science from Johns Hopkins University.

## 2-2:30pm: A Jewish Organization's Journey to Impact Investing in Israel

Three years ago, UJIA, a large Jewish charitable organization in the UK, launched a new impact investing program in Israel. Learn from UJIA's unexpected journey to impact investing: how the organization engaged a new set of stakeholders, overcame obstacles, and leveraged the organization's capital in a new way to support a cohort of Israeli social purpose businesses. This session will also offer an overview and update on the Israeli impact investing ecosystem.



**Dalia Black** is the Founder and Principal at Weave Impact, guiding clients in creating and implementing social impact investment strategies in Israel. Weave works with families, foundations and corporates in identifying socially impactful investments across all asset classes and impact themes. Dalia has over 20 years' experience in the financial services sector including as Vice President of Delek Group, a TA25 company, before founding Weave Impact. Dalia earned a BA Hons. in Politics & Economics from Leeds University, UK. She is an active member of various industry committees and the Founder & Chair of Meshutaf Tel Aviv, the first Jewish pluralist school in Tel Aviv. Dalia lives in Tel Aviv with her husband and three children.

## 2:30-3pm: The Hardest Part of the How: Impact Measurement

Impact investing requires thinking about investing in an entirely new way. Done well, impact investing involves ongoing engagement and monitoring of an investment's social impact in addition to financial return; this demands a link between an organization's financial side and its "mission-oriented" staff. Join this session to understand how to think about impact measurement, and learn from the specific experience of the MacArthur Foundation, which in the past several years began an in-depth process to measure the impact of its investment portfolio.



**Leticia Emme** is a Senior Manager at the Global Impact Investing Network (GIIN) focusing on IRIS and Impact Measurement and Management. Leticia has over a decade of experience managing and facilitating cross-stakeholder collaboration efforts. Prior to joining the GIIN, Leticia served as Director at the Social Performance Task Force (SPTF) where she managed the Social Investor Working Group and oversaw the Responsible Inclusive Finance Facility in Central America and Caribbean. Leticia holds an M.B.A. from the Kellogg School of Management at Northwestern University and a B.A. from Universidad de San Andres (Argentina). Born and raised in Argentina, Leticia is a native Spanish speaker.



**Charles Coustan**, Portfolio Manager, Impact Investments at the MacArthur Foundation, is responsible for managing the portfolio of impact investments including loans, equity investments, deposits and guarantees in the Foundation's impact investment portfolio. Charles most recently served as Executive Director at World Bicycle Relief, an international non-profit. Prior to WBR, Charles spent 10 years in equity research, the last six of which were at William Blair. Earlier in his career, he was the Director of Housing Development at Tenderloin Neighborhood Development Corporation working with low-income housing in San Francisco. He holds a B.A. in Economics from the University of Michigan, Ann Arbor, and a M.B.A. from the Haas School of Business at the University of California at Berkeley.



**Greg Neichin** is the Director of Ceniarth and Board Member of the related Isenberg Family Charitable Foundation. Ceniarth is an impact-first investor focused on funding market-based solutions that benefit underserved communities. Prior to Ceniarth, Greg served as Executive Vice President of Cleantech Group. Greg is also an active lay leader in the Bay Area Jewish community: he chairs the Jewish Community Federation's Advisory Task Force on Impact Investing and is an incoming member of the Federation's Endowment Committee. In addition, he is a member of the Wexner Heritage Program's 2018 San Francisco Cohort. Greg has a B.A. from Dartmouth College and an M.B.A. from the Wharton School.