

**“Investing for the Poor:
How Impact Investing Can Serve the Common Good
in the Light of *Evangelii Gaudium*”**

16-17 June 2014

Rome, Italy

PROGRAM



Key Questions Motivating the Conference

First Day: Focus on Education and Awareness

- What is Impact Investing and what are core concepts for understanding this movement?
- What are some examples from emerging and developed markets that illustrate different approaches: e.g., debt structures, private equity, and new hybrid structures?
- How has investing for the common good evolved since the early 1980s and what are the future trends and potential?
- What basis and orientation does Catholic Social Teaching (incl. *Evangelii Gaudium*¹) provide for Impact Investing?
- How can investments contribute to Catholic-inspired or Catholic-sponsored Social Development?
- What are the international and social development needs and opportunities that Impact Investing could help address?

Second Day: Focus on How Impact Investing Works and Potential Next Steps

- How have organizations implemented programs, why have they chosen certain approaches, and what lessons have they learned?
- What and who is required to build the Impact Investing ecosystem?
- Who are partners willing and able to align with and help implement the mission of the Church?
- What is a framework for evaluating and implementing the different Impact Investing options?
- How would conference attendees like to continue the conversation?
- What high-priority topics warrant further exploration?

¹ *Evangelii Gaudium* (The Joy of the Gospel) is a 2013 apostolic exhortation by Pope Francis on the Church's primary mission of evangelization in the modern world. For the full text, please see:

http://www.vatican.va/holy_father/francesco/apost_exhortations/documents/papa-francesco_esortazione-ap_20131124_evangelii-gaudium_en.html

Sunday, 15 June 2014

Travel Day

19.00 – 20.00 ***Reception***
Hotel il Cantico

20.00 – 21.30 ***Dinner***
Hotel il Cantico

Monday, 16 June 2014

First Day

6.45 – 7.15 ***Travel to Mass on foot***
Please meet at the front entrance of Hotel il Cantico. The group will depart promptly at 6.45

7.15 – 7.45 ***Mass***
St. Peter's Basilica
Celebrant: His Eminence, Peter K.A. Cardinal Turkson

7.45 – 8.15 ***Return to Hotel il Cantico***

8.15 – 9.00 ***Breakfast and Registration***
Hotel il Cantico

9.00 – 9.05 ***Morning Prayer***
His Eminence, Peter K. A. Cardinal Turkson
President of the Pontifical Council for Justice and Peace

9.05 – 9.20 ***Welcome and Opening Remarks***
His Eminence, Peter K. A. Cardinal Turkson
President of the Pontifical Council for Justice and Peace

9.20 – 9.35 ***Introduction***
Dr. Carolyn Woo
President and CEO, Catholic Relief Services

Dean Roger Huang

Martin J. Gillen Dean for the Mendoza College of Business at the University of Notre Dame

9.35 – 10.20

Core Concepts and Framework for Analysis

Dr. Filipe Santos

Academic Director, INSEAD Social Entrepreneurship Initiative

10.20 – 10.40

Nature Break and Bus Boarding for Transfer to St. Peter's Basilica
Please note there are no public washrooms immediately available inside St. Peter's Basilica

10.40 – 11.05

Transfer to St. Peter's Basilica
Busses will depart promptly at 10.40

11.05 – 11.15

Transition to Audience

11.15 – 11.45

Audience Briefing

11.45 – 12.15

Audience with His Holiness Pope Francis

12.25 – 12.45

Return to Hotel il Cantico
Busses will depart promptly at 12.25

12.55

Speaker Group Photograph
Hotel il Cantico

13.00 – 14.00

Lunch

14.00 – 15.00

Serving the Poor and Vulnerable – Investing in Action (Panel Discussion)

Dr. Patricia Dinneen (Moderator)

Chair, Impact Investing Council, Emerging Markets Private Equity Association

Healthcare and Education in Brazil

Marcus Regueira

Managing Director, FIR Capital

Smallholder Businesses in Nicaragua

John Kohler

Director, Impact Capital, Santa Clara University

Microinsurance in Southeast Asia

Michael Fernandes

Partner, LeapFrog Investments

15.00 – 15.45

Future Potential

Sir Ronald Cohen

Chair of the Social Impact Investment Taskforce established by the G8

15.45 – 16.05

Coffee Break

16.05 – 16.45

Impact Investing and Catholic Social Teaching

Fr. Seamus Finn, OMI

Vice Chair of the Board, Interfaith Center on Corporate Responsibility

16.45 – 17.30

Public and Private Partnerships: Building the Ecosystem (Panel Discussion)

Margie Sullivan (Moderator)

Chief Operations Officer and Chief of Staff, U.S. Agency for International Development

Dr. Rajiv Shah

Administrator, U.S. Agency for International Development

John Rogers

Executive Vice President, Chief of Staff, and Secretary to the Board, Goldman Sachs

Tom Steyer

Founder, NextGen Climate

17.30 – 18.00

Plenary Discussion: Relevance, Challenges, and Open Questions

18.30 – 19.30

Reception

Hotel il Cantico

19.30 – 21.00

Dinner

Hotel il Cantico

Tuesday, 17 June 2014

Second Day

- 7.00 and 8.00 ***Mass***
You are welcome to join the local community for regularly scheduled worship services at the Parish of St. Gregory VII Pope Jasmine, located approximately 100 meters from Hotel il Cantico
- 7.30 – 8.45 ***Breakfast***
Hotel il Cantico
- 8.55 – 9.00 ***Morning Prayer***
Fr. Michael Czerny, S.J.
Pontifical Council for Justice and Peace
- 9.00 – 9.20 ***Reflections on First Day***
Dr. Carolyn Woo
President and CEO, Catholic Relief Services
- 9.20 – 10.00 ***Impact Investing in the Light of Evangelii Gaudium***
Sr. Helen J. Alford, O.P.
Dean of the Faculty of Social Sciences at The Pontifical University of Saint Thomas Aquinas (the *Angelicum*)
- 10.00 – 10.20 ***Coffee Break***
- 10.20 – 11.20 ***Sectoral Needs and Opportunities (Panel Discussion)***
Sean Callahan (Moderator)
Chief Operating Officer, Catholic Relief Services
- Agriculture Livelihoods in Latin America***
Shaun Ferris
Director of Agriculture Programming, Catholic Relief Services
- Healthcare in Africa***
Tom McPartland
CEO, ELMA Philanthropies Services
- Water in India***
Paul Polak
Founder and CEO of Windhorse International

- 11.20 – 12.00 ***Blending Philanthropy and Impact Investments in a Faith-Inspired Model***
Dr. Mirza Jahani
CEO, Aga Khan Foundation U.S.A.
- 12.00 – 12.30 ***For-Profit and Non-Profit Collaboration***
Sal Giambanco
Partner, Omidyar Network
- Matt Bannick**
Managing Partner, Omidyar Network
- 12.30 – 13.30 ***Lunch***
- 13.35 – 14.00 ***Emergence of Investing for Good***
Terry Mollner
Board Member, Calvert Family of Socially Responsible Investment Funds
- 14.00 – 14.30 ***Vatican Bank Perspectives***
Ernest von Freyberg
President, Institute for Works of Religion, The Holy See
- 14.30 – 15.10 ***Outlook of Catholic Institutional Investors (Panel Discussion)***
Mark Palmer (Moderator)
Chief Financial Officer, Catholic Relief Services
- Steve Schott**
CapTrust Advisors
- Jimmy Ryan**
Bank of America Merrill Lynch
- 15.10 – 15.30 ***Coffee Break***
- 15.30 – 16.00 ***Outlook of Catholic Investment Funds***
Andreas Widmer
Director of Entrepreneurship Programs at The Catholic University of America and President of The Carpenter's Fund
- 16.00 – 17.10 ***Small Group Discussions: Models and Partners for Future Action***

17.10 – 17.40 *Moving Forward: Plenary Discussion*

17.40 – 18.00 *Closing Remarks*
His Eminence, Peter K. A. Cardinal Turkson
President of the Pontifical Council for Justice and Peace

Wednesday, 18 June 2014

Optional Day

10.00 – 12.00 Tour of the Vatican Museum and Sistine Chapel (RSVP required)

13:00 Informal Side Meetings (Individually arranged)