

FOUNDATION INVESTING 2.0

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

This in-person masterclass is designed for Foundations looking to get started or further develop their approaches to impact and responsible investing. The workshop will look at the importance of investment beliefs as a building block for your total portfolio strategy. We will also explore best practices in developing policies and governance frameworks, working 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:

TUESDAY, NOVEMBER 19TH
9AM – 4PM

LOCATION:

2 St Clair Street East, Suite 300
Toronto, Ontario

HOSTED BY:



EVENT PARTNERS:



CONFIRMED SPEAKERS AND FACILITATORS

Colette Murphy, Executive Director, Atkinson Foundation

Brian Toller, Board Member, Community Foundations of Canada

Marcelle Lauzière, President and CEO, Lawson Foundation

Karen Shelstad, Director, Social Finance, Lawson Foundation

Andrea Nemtin, Executive Director and Partner, Rally Philanthropy

Shannon Rohan, Chief Strategy Officer, SHARE

FOUNDATION INVESTING 2.0

AGENDA

8:30	Registration / Light breakfast
9:00	Welcome and Introductions
9:30	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.
10:00	Storytelling: Getting the Foundations Right Hear from Brian Toller, former Chair of the Ottawa Community Foundation Investment Committee, on some of the initial steps they took to establish a strong governance framework for their impact and responsible investing activities including some of the key lessons they have learned along the way.
10:30	Break
10:30	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.
11:45	Storytelling: Delivering Impact in Public Markets Hear from Colette Murphy, Executive Director of the Atkinson Foundation, on their impact and responsible investing journey with a specific focus on their efforts to use their voices as shareholders to support decent work in their portfolio companies and to inspire others to join them.
12:15	LUNCH
1:00	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?
2:00	Storytelling: Delivering Impact Across Asset Classes Hear from Marcelle Lauzière and Karen Shelstad from the Lawson Foundation about their efforts to pursue impact investing strategies across different asset classes. What were some of the challenges and how were those overcome?

FOUNDATION INVESTING 2.0

2:30	Break
3:00	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 and resources and support that you will need to help continue your journey.
3:45	Closing

