

# 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:

THURSDAY, NOVEMBER 14<sup>TH</sup>  
9:30AM – 4PM

### LOCATION:

ROOM 1430, SFU Harbour Centre  
515 West Hastings Street  
Vancouver, BC

### 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

<b>9:30</b>	<b>Registration / Light breakfast</b>
<b>10:00</b>	<b>Welcome and Introductions</b>
<b>10:30</b>	<b>Impact and Responsible Investing Overview</b>  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.
<b>11:00</b>	<b>Storytelling: Getting the Foundations Right</b>  Hear from a fellow Foundation 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.
<b>11:30</b>	<b>Break</b>
<b>11:45</b>	<b>Investment Beliefs: Foundations for Decision-Making and Governance</b>  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.
<b>12:30</b>	<b>LUNCH</b>
<b>1:30</b>	<b>Storytelling: Delivering Impact in Public Markets</b>  Hear from Coast Funds about their efforts to ensure that their proxy voting rights were being used in a way that aligned with their broader values and expectations, particularly with regards to Indigenous rights and reconciliation.
<b>2:00</b>	<b>Implementing a Total Portfolio Approach to Impact and Responsible Investing</b>  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?
<b>2:30</b>	<b>Break</b>
<b>2:30</b>	<b>Small Group Discussions</b>

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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.

3:30

Closing

