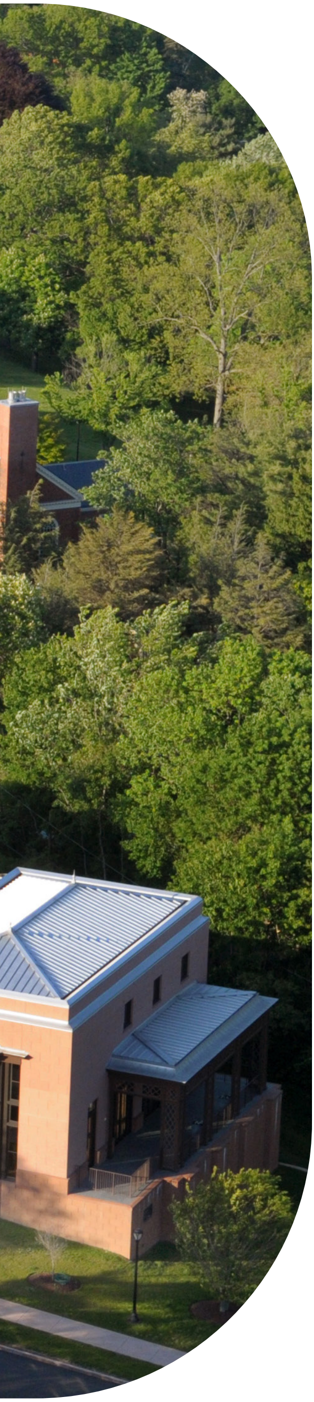
THE INVESTMENT STEWARDSHIP ACADEMY

Agenda

YALE UNIVERSITY
GREENBERG CONFERENCE CENTER

Sunday, June 2 - Wednesday, June 5, 2024
New Haven, Connecticut

commonfund
INSTITUTE



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About Commonfund Institute

Commonfund Institute is among the nation's most trusted sources for relevant, useful, and proprietary data, analytics, and best practices in financial management. The Institute provides a wide variety of resources, including conferences, seminars, roundtables, and online learning through Commonfund Institute Online. Insights cover topics such as endowments and governance; proprietary and third-party research such as the Commonfund Benchmark Studies®; publications including the Commonfund Higher Education Price Index® (HEPI); and events such as the annual Commonfund Forum and Investment Stewardship Academy. **For additional information about Commonfund Institute, please visit www.commonfund.org/commonfund-institute.**

MEET OUR TEAM

George Suttles
Executive Director

Allison Kaspriske
Director

Amanda Novello
Senior Policy and Research Analyst

Kiyana Campbell
Associate

Things to Know

THE BLAKE HOTEL

9 High Street, New Haven, CT | 203.390.5352

CLASSROOM SESSIONS

All classroom sessions will take place in the Greenberg Center on the Yale University campus, 391 Prospect Street, New Haven, CT.

The Maurice R. Greenberg Conference Center at Yale University is a conference facility available for use by international leadership programs and Yale-affiliated events. The building is designed to accommodate a wide range of activities, from conferences and corporate retreats to receptions and dinners.

SHUTTLE SERVICE

Shuttle service will be provided between The Blake Hotel and the Greenberg Center each morning and afternoon. If you are driving to campus, there are a limited number of complimentary parking spaces available at the Greenberg Center. Parking will be on a first come, first serve basis. Shuttle service will also be provided to and from The Blake Hotel to dinner on Sunday and Monday evenings.

WI-FI

While on campus at the Greenberg Center free high-speed internet access is available to all Investment Stewardship Academy attendees.

You can access Wi-Fi using the network "YaleGuest." There is no password. Complimentary Wi-Fi is also available to all guests of The Blake Hotel.

SOCIAL MEDIA

Stay up to date on the latest by following Commonfund on LinkedIn @commonfund. Please tag us and use #ISA2024 to join the conversation.

ATTIRE

Business casual is appropriate for all sessions and meals.

ONSITE CHECK-IN AND REGISTRATION

Check in to The Blake Hotel begins at 4:00 PM. Registration for the Investment Stewardship Academy program will be held from 3:00-5:00 PM on Sunday, June 2, in the lobby of The Blake Hotel.

Agenda-at-A-Glance

● Session is eligible for Continuing Professional Education (CPE) credits. A maximum of 16.2 credits can be earned for class time.

Sunday, June 2nd

	3:00 PM	Registration Opens
		Yale University Campus Tour (optional)
	5:00	Registration Closes
	5:15	Shuttle to Dinner
	5:30	Welcome Dinner

Monday, June 3rd

	7:45 AM	Shuttle to Greenberg Center
	8:00	Breakfast
	8:30	**Welcome Remarks and Program Overview**
●	8:45	**The State of Nonprofit Institutional Investing**
●	9:30	**Purpose-Driven Board Leadership**
	10:30	Break
●	11:00	**The Evolution of Governance: Stewardship, Strategy and Growth**
	12:00 PM	Lunch
●	1:00	**The Most Important Investment Decisions: Governance, Liquidity, and Asset Allocation**
●	2:00	**Is the Endowment Working Hard Enough for Your Institution?**
	3:00	Break
●	3:15	**Reimagining Spending as a Tool for Mission-Oriented Endowment Management**
	4:30	Shuttle to The Blake Hotel
	5:45	Shuttle to Dinner
	6:00	Dinner

Tuesday, June 4th

	7:45 AM	Shuttle to Greenberg Center
	8:00	Breakfast
●	8:30	**Responsible/Values-Aligned Investing Strategies**
	9:45	Break
●	10:15	**Building Bridges Between Fundraising, Finance, and Investing for Endowment**
	11:30	Lunch
●	12:45 PM	**Experiential Private Equity Case Study**
	2:15	Break
●	2:30	**Private Equity Manager Discussion**
	3:30	**Keynote Presentation | Dr. Jay Van Bavel**
	4:45	Shuttle to The Blake Hotel
	6:30	Dinner

Wednesday, June 5th

	7:45 AM	Shuttle to Greenberg Center
	8:00	Breakfast
●	8:30	**Organizational Development for Growth and Sustainability**
●	9:30	**OCIO Panel: Considerations for Strategic Partnership**
	10:30	Break
●	10:45	**The Future of Institutional Investing**
	11:45	**Closing Remarks**
	12:00 PM	Grab and Go Lunch
	12:15	Shuttle to the Blake Hotel

Agenda

SUNDAY | JUNE 2ND

3:00 PM	Registration Opens – The Blake Hotel Lobby
	Yale Campus Walking Tour The Yale campus tour will depart from the front of The Blake Hotel and continue through the main part of the Yale campus. The tour will end at the Yale Bookstore, a short walk from The Blake Hotel. The tour takes about 75minutes.
5:00	Registration Closes
5:15	Shuttle to Dinner
5:30	Dinner - Harvest 1104 Chapel Street, New Haven, CT

MONDAY | JUNE 3RD

7:45 AM	Shuttle to Greenberg Center
8:00	Breakfast
8:30	**Welcome Remarks and Program Overview** *George Suttles, Commonfund Institute*
8:45	**The State of Nonprofit Institutional Investing** To advance the mission of an organization it is necessary that many levers be pulled. This session will provide an overview about what has changed in the institutional landscape since the last time we met and how it all plays into the state of nonprofit endowment management and stewardship today. *Mark Anson, Commonfund*
9:30	**Purpose-Driven Board Leadership** Nonprofit, mission driven institutions are governed by Boards that steward institutions on behalf of many different constituents and stakeholders. BoardSource has introduced a new way of framing the nonprofit board's role and issued a call for what they've termed "Purpose-Driven Board Leadership." This form of leadership prioritizes purpose first-and-foremost and offers a set of principles that can drive nonprofit board leadership and thinking. *Dani Robbins, BoardSource*
10:30	Break
11:00	**The Evolution of Governance: Stewardship, Strategy and Growth** Evolution can be defined as "a process of continuous change from a lower, simpler, or worse to a higher, more complex, or better state". For boards of trustees and their roles as fiduciaries, evolving over time is critical to the growth and success of the institutions they serve—but how does a board evolve effectively? And how does a board commit to evolving when there is a change to the institution's mission, leadership and the markets? This session will explore how a board can maintain synchronicity and grow and develop with the institution, specifically when encountered with outside stressors from the economy and global markets, resulting in a shift on the investments. *Susan Gary, University of Oregon, School of Law; Dani Robbins, BoardSource; Rosalie Sheehy-Cates, Philanthropy Northwest, The Giving Practice* *Moderated by Commonfund Institute*
12:00 PM	Lunch

Agenda

1:00	**The Most Important Investment Decisions: Governance, Liquidity, and Asset Allocation** There are many important decisions that investment committees make when stewarding endowments or other perpetual pools of assets that support their missions. Of all of them, governance, liquidity and asset allocation are considered to be the preeminent. This session will explore why these key factors are needed in order to make strategic and effective decisions for your institution. *George Suttles, Commonfund Institute; Tim Yates, Commonfund OCIO*
2:00	**Is the Endowment Working Hard Enough for Your Institution?** Given the challenging market environment, many nonprofits today need their endowment to work even harder for their institution and its beneficiaries to ensure its perpetuity. The key to this future success lies in strategic asset allocation. This session will challenge conventional wisdom and demonstrate approaches to key inputs into strategic allocation for optimal long-term investment plans. *Felipe Arguello & Anthony Peretore, Commonfund OCIO*
3:00	Break
3:15	**Reimaging Spending as a Tool for Mission-Oriented Endowment Management** As the only permanent link between the endowment and the institution it supports, the spending, or distribution, policy is a critical component of endowment management. This session will explore how spending policy can bridge this gap between accepting volatility in pursuit of long-term returns while generating stable income for your institution and, how spending rate can impact both spending ability and long-term sustainability of the investment portfolio, allowing your institution to move into perpetuity and fulfill its mission. *Steve Gasparini & Rachel Stavola Clivaz, Commonfund OCIO*
4:30	Shuttle to The Blake Hotel
5:45	Shuttle to Dinner
6:00	Dinner – Frank Pepe’s Pizzeria 157 Wooster Street, New Haven, CT

TUESDAY | JUNE 4TH

7:45 AM	Shuttle to Greenberg Center
8:00	Breakfast
8:30	**Responsible/Values-Aligned Investing Strategies** This session will explore policy and implementation strategies for responsible and values alignment across asset classes, including ESG, Impact, Racial Equity and Gender Lens investing. *Eric Horvath, Earlystone Management*
9:45	Break
10:15	**Building Bridges Between Fundraising, Finance, and Investing for Endowment** Fundraising has become an essential strategic capability that endowed institutions have come to rely on in order to thrive—or, perhaps, to survive—especially as the volatility in the markets causes upheaval to institutional processes and operations. With this stress and uncertainty, endowments remain more important than ever to the stability and sustainability of the long-term health of the institutions they support, and the loss or permanent impairment of endowment value threatens to harm the long-term missions of these institutions. This session will highlight how fundraising and investing for endowment can work together to ensure the financial security and stability of an institution, why bridging the gap between them is something institutions should strive to do and strategies for implementation. *Crickett Kasper, Council for Advancement and Support of Education (CASE); Dr. Amir Pasic, Indiana University Lilly Family School of Philanthropy* *Moderated by Commonfund Institute*
11:30	Lunch
12:45 PM	**Experiential Private Equity Case Study** Sit in on a real-time private equity manager due diligence meeting and selection decision. *Elijah Han, CF Private Equity; Tim Yates, Commonfund OCIO*
2:15	Break
2:30	**Private Equity Manager Discussion** Join us for an in-depth discussion with a private equity manager. We will discuss strategy, long-term portfolio objectives and things to consider when deciding if/when to allocate to private equity. There will be opportunities for Q&A and peer dialogue. *Mark Hoeing, CF Private Equity; Allan Weinstein, Gainline Capital Partners*

Agenda

3:30	**Keynote Presentation | The Power of Us: Lessons for Effective Leadership** Bringing his fascinating research to life in engaging, practical talks, Van Bavel shows us how to harness the power of shared identities in today's world: helping us lead more effectively, boost productivity and collaboration, overcome our biases, and inspire real change, both personally and societally. *Jay Van Bavel, Professor of Psychology and Neural Science at New York University, an affiliate at the Stern School of Business in Management and Organizations, Director of the Social Identity & Morality Lab*
4:45	Shuttle to The Blake Hotel
6:30	Dinner – High George at The Blake Hotel 9 High Street, New Haven, CT

WEDNESDAY | JUNE 5TH

7:45 AM Shuttle to Greenberg Center

8:00 Breakfast

8:30 **Organizational Development for Growth and Sustainability**
This session will explore the importance of having institutional strategies around human and social capital, environmental and social responsibility, value creation and evolution, and how and why investing in these elements can contribute to institutional growth and organizational sustainability for the long term.
Delicia Nahman, Lafayette College; Dr. Charles B. W. Prince, Dillard University; Roshell Rinkins, Knight Foundation
Moderated by Commonfund Institute

9:30 **OCIO Panel: Considerations for Strategic Partnership**
It is important for institutions to understand the nature of an OCIO relationship and the key roles each person plays. This session will review questions to ask and things you should consider when evaluating a potential need for an outsourced investment relationship.
Amy Harlacker, Commonfund OCIO; James Scheinberg, North Pier Search Consulting
Moderated by Commonfund Institute

10:30 Break

10:45 **The Future of Institutional Investing**
The institutional investment industry has seen significant change in recent years, and it continues to evolve and grow in many ways. As a result, institutions are faced with the challenge of trying to identify trends, opportunities, and potential obstacles and anticipate how these will impact portfolios and their institution's ability to meet mission. In this session, panelists will grapple with key questions as they offer their perspectives on the future of institutional investing.
Roz Hewsenian, Helmsley Charitable Trust; Christopher Koler, The Community Foundation for Greater New Haven; Mamak Shahbazi, Commonfund Board of Trustees
Moderated by Mark Anson, Commonfund

11:45 Closing Remarks

12:00 PM Grab & Go Lunch

12:15 Shuttle to The Blake Hotel

Keynote Speaker

Jay Van Bavel

Professor of Psychology & Neural Science at New York University, an affiliate at the Stern School of Business in Management and Organizations, and Director of the Social Identity & Morality Lab

The Power of Us: Lessons for Effective Leadership

One of the biggest misconceptions we have about our identity as people, professionals and board members is that it's stable—when in reality, it's constantly changing to reflect the groups we belong to, the organizations we represent, the constituents we work for, and the missions we steward. In his new award-winning book "The Power of Us: Harnessing Our Shared Identities to Improve Performance, Increase Cooperation, and Promote Social Harmony"—a blend of cutting-edge research in psychology and neuroscience—NYU professor JAY VAN BAVEL reveals how our identities are powerfully influenced by the groups and organizations we're part of, and why this knowledge is especially crucial during the turbulent times we're living in and the organizations we are stewarding. Bringing his fascinating research to life in engaging, practical talks, Van Bavel shows us how to harness the power of shared identities in today's world: helping us lead more effectively, boost productivity and collaboration, overcome our biases, and inspire real change, both personally and societally.

Faculty Bios

Mark Anson, PhD, CFA, CAIA

CEO and CIO, Commonfund

Mark Anson is the Chief Executive Officer and Chief Investment Officer of the Commonfund and Chair of the Boards of CF Private Equity and Commonfund OCIO. Previously, he was the President and Chief Investment Officer for the Bass Family Office of Ft. Worth, Texas which was recognized as Family Office of the Year for 2014 & 2015. He was the President and Global Head of Investment Management at Nuveen Investments, a full-service asset management company with over $900 billion in assets under management. Prior to Nuveen, Mark served as the Chief Executive Officer and Chief Investment Officer for the British Telecom Pension Scheme (BTPS), the largest institutional investor in the UK with assets of £55 billion. In addition, Mark was the CEO of Hermes Pensions Management in London, a £60 billion asset management company that is wholly owned by the BTPS. Prior to joining BTPS, he served as the Chief Investment Officer of the California Public Employees' Retirement System, the largest institutional investor in the United States with over $250 billion in assets. Mark is currently the Chairman of the Investment Committee for the $60 billion UAW Medical Benefits Trust. He also serves on the Law Board of the Northwestern University School of Law, and the Board of the Toigo Foundation. He is the only person to serve on the Board of Governors for both the CFA Institute and the CAIA Association. He was an inaugural member of the SEC Investor Advisory Committee and the Chairman of the Board for the International Corporate Governance Network. Mark has published over 90 investment articles in professional journals and has won three Best Paper Awards. He is the author of five financial textbooks including the Handbook of Alternative Assets, which is the primary textbook used for the Chartered Alternative Investment Analyst program. Mark earned a B.A. in Economics and Chemistry from St. Olaf College, a Ph.D. and Masters in Finance from Columbia University Graduate School of Business, and a J.D. from Northwestern University School of Law, all with honors. He has also received several industry awards in recognition of his leadership in asset management including the Lifetime Achievement Award in Pension Fund Management from Plan Sponsor and the CAIA Leadership Award from the CAIA Association. Last, Mark has earned the Chartered Financial Analyst, Chartered Alternative Investment Analyst, Certified Public Accountant, and Chartered Global Management Accountant professional degrees, and he is a Member of the Law Bar of New York and Illinois.

Felipe Arguello

Managing Director, Commonfund OCIO

Felipe Arguello is a member of the Commonfund OCIO Investment team and is primarily responsible for designing, tailoring, and implementing custom investment solutions for clients through asset allocation recommendations, portfolio oversight and analysis, and tactical rebalancing of portfolios. Prior to joining Commonfund, he worked for 14 years at BlackRock, where he was responsible for delivering custom multi-asset solutions for institutional clients across North America, Europe and Asia. When Felipe first joined the firm, he was with the Financial Institutions Group, where he oversaw asset allocation strategy and client service for insurance and other taxable investors. Before BlackRock, he worked at Lloyds Banking Group in various locations including New York, Switzerland, and Uruguay, providing advisory solutions to high net worth individuals, endowments, and foundations. Felipe earned a bachelor degree, with honors, in international business from La Sabana University and is a CFA Charterholder.

Faculty Bios

Susan Gary

Professor Emerita, University of Oregon, School of Law

SUSAN N. GARY, Professor Emerita and formerly Orlando J. and Marian H. Hollis Professor at the University of Oregon School of Law, received her B.A. from Yale University and her J.D. from Columbia University. Before entering academia, she practiced with Mayer, Brown & Platt in Chicago, and with DeBandt, van Hecke & Lagae in Brussels. Professor Gary has taught trusts and estates, estate planning, estate and gift tax, nonprofit organizations, and an undergraduate course on law and families. She has written and spoken about purpose trusts as a new form of business ownership, the regulation of charities, fiduciary duties including the prudent investor standard, the definition of family for inheritance purposes, donor intent in restricted charitable gifts, and the use of mediation in the estate planning context. She served as a trustee on the University's Board of Trustees.

Professor Gary is an Academic Fellow and former Regent of the American College of Trust and Estate Counsel and served on the Council of the Real Property, Trust and Estate Section of the American Bar Association. She served as Reporter for three projects of the Uniform Law Commission: the Uniform Electronic Wills Act, the Uniform Prudent Management of Institutional Funds Act, and the Model Protection of Charitable Assets Act. She was a member of the steering committee of the Intentional Endowments Network and serves on its Fiduciary Investment Committee. She has served on the Advisory Board of the NYU National Center on Philanthropy and the Law and has held leadership positions in three sections (trusts and estates, elder law, and nonprofits) of the Association of American Law Schools.

In Oregon, Professor Gary has been a member of the Oregon Law Commission and served as Reporter for its Probate Modernization Work Group. She has served on the Executive Committees of the Nonprofit Organization Law Section and the Estate Planning Section of the Oregon State Bar. Significant recent articles include "The Changing Landscape of Business Succession: How and Why Purpose Trusts Matter," Ohio State Bus. L. J. (forthcoming 2024), "Best Interests in the Long Term: Fiduciary Duties and ESG Investing," 90 Univ. of Colorado L. Rev. 731 (2019), and "The Oregon Stewardship Trust: A New Type of Purpose Trust that Enables Steward-Ownership of a Business," 88 Univ. of Cincinnati L. Rev. 707 (f2019).

Steven Gasparini

Director, Commonfund OCIO

Steven Gasparini is a member of the Commonfund OCIO Investment team and is primarily responsible for assisting in the design, tailoring and implementation of custom investment solutions for clients, as well as client portfolio analysis and specialized analytical requests. Prior to joining Commonfund, Steven attended undergraduate school at the University of Connecticut where he graduated with a B.S. in Finance and a minor in Economics. At the University of Connecticut, Steven also co-led the Student Managed Fund his senior year, assisting with the management and investment of endowment funds entrusted by the UConn Foundation.

Elijah Han
Director, CF Private Equity

Elijah Han is a member of the Private Equity team at CF Private Equity and is responsible for sourcing, due diligence and investment underwriting for the firm's private equity strategy. He previously worked as an Investment Banking Analyst at Mesirow Financial where he specialized in financial advisory and mergers and acquisitions in the aerospace and defense, industrials and plastics and packaging industries. Elijah began his career as an Associate at Mesirow Financial Consulting, LLC, advising on corporate turnarounds, financial restructurings, valuation and litigation related engagements. He earned a B.S. in Accountancy and Finance from the College of Business at the University of Illinois.

Amy Harlacker
Managing Director, Commonfund OCIO

Amy Harlacker is Head of Operations. She oversees the delivery of operational and investor services to outsourced CIO clients and fund investors which includes the management of valuations and financial and regulatory reporting for Commonfund funds. As a member of the Commonfund OCIO Executive Group, Amy is responsible for collaborating with members of the team to provide operational leadership, direction and support during the implementation of the organization's strategic plans and initiatives. She has also held a series of roles within the Commonfund organization across the Financial Operations, Client Service and Information Technology groups. Prior to joining Commonfund, Amy was a business analyst at Energy East Corporation. She is a member of the Board of Directors of the Aspetuck Land Trust and holds an M.B.A. from Rensselaer Polytechnic Institute and a B.S. in Civil Engineering from Lehigh University.

Roz Hewsenian
CIO, Helmsley Charitable Trust

Ms. Hewsenian is an accomplished investment industry executive who has worked on all sides of the investment industry: asset management, investment consulting and plan sponsor. Her particular areas of expertise are executive management, regulatory compliance, marketing and investment management process. She has served on mutual fund and private asset management, trade association and asset management advisory boards specializing in growth, life cycle transition and turn-around situations. Ms. Hewsenian is the current and first permanent Chief Investment Officer of the $7 billion Helmsley Charitable Trust overseeing its scaling from $2.5 billion to $7 billion during her tenure. Prior to that she was the Chief Executive Officer of the global firm, Clay Finlay Asset Management, which was a turn- around situation.

She served for 21 years as a Managing Director, Equity Principal and Board Member of Wilshire Associates, Santa Monica California. Through her leadership she contributed to the firm's considerable growth and industry prominence. Ms. Hewsenian was the Vice President-Operations of Dimensional Fund Advisers. She has also held operating and investment positions at PepsiCo and General Foods (now Kraft). She holds a BS Degree from SUNY, Oneonta NY and an MBA Awarded with Distinction From Pace University.

Faculty Bios

Mark Hoeing

President and CEO, CF Private Equity

Mark Hoeing is President and CEO of CF Private Equity, Head of the firm's Buyout and Growth Equity investment practice, a member of the Investment Committee and Senior Executive Group of CF Private Equity and a member of the Operating Committee of Commonfund Group. As President and CEO, Mark's responsibilities include the strategic direction of the firm and oversight of investment solutions in buyouts, growth equity, venture capital, and real assets and sustainability. As Head of Buyouts and Growth Equity investments, his responsibilities include managing due diligence, investment selection, portfolio construction, monitoring, and fundraising for the firm's buyout and growth equity strategies that include primaries, secondaries and co-investments. Prior to joining CF Private Equity, his experience includes positions at Deutsche Bank, evaluating third-party managers in the private capital funds division, as well as direct private capital investing with DB Capital Partners, Deutsche Bank's merchant banking subsidiary. Part of Mark's work at Deutsche included the bank's coverage of the Asia-Pacific basin. Mark began his career as a credit analyst and commercial lending officer with Citizens Financial Group. He is presently a member of the advisory boards of several private equity limited partnerships. Mark has a B.S. in Health Policy and Management and an M.B.A. from Providence College.

Eric Horvath

Vice President, Community-Engaged Investing, Earlystone Management

Eric is driven by a single, fundamental question: how do we transform how power and resources are shared in our economy, while centering those who have been systematically excluded?

Eric mobilizes resources for underserved communities as both an investor and an educator. He is Vice President for Community-engaged Investing at Earlystone Management, a family office. He also leads an initiative at Harvard Law School focused on supporting labor pension fund trustees advocate for more responsible investing at their Funds.

Previously, Eric served as the Director of Impact Investments at Common Future, where he led the organization's impact-first investments by-for-and-with communities of color. Before, he was at Transform Finance, where he led educational initiatives for activists and organizers exploring paths for their communities to better engage with capital. He's also worked at the Woodcock Foundation, where he supported the organization's grantmaking and impact investments.

Eric serves on multiple boards and investment committees (New York Foundation, UUCEF, Invest Appalachia) and teaches "Capital for Good: Finance, Investment and Social Justice" to graduate students at The City College of New York in Harlem.

A former Fulbright Grantee, Eric earned his MPA from Syracuse University and his MBA from NYU. He calls Brooklyn home.

Crickett Kasper

Director of Schools, Council for Advancement and Support of Education (CASE)

Crickett Kasper joined CASE as the new Director of Schools in August of 2023. She is a Baltimore native, the mother of two small children, and the partner of an educator and freelance writer. Crickett is a career advancement professional, having worked in independent schools, international schools, nonprofit radio, and higher education for more than 19 years. She specializes in building teams and supporting school communities interested in establishing or enhancing their advancement programs. Her work with CASE supports our international and independent school programs and members.

Crickett comes to her position with CASE having led advancement teams at schools in three countries. Most recently she served as the Chief Advancement Officer for Singapore American School where she was the senior leader responsible for the integrated advancement program and community outreach to parents and alumni. This included building the structures and relationships for the launch of a $50 Million SGD capital campaign to support a full campus rebuild and renovation. Her other school experiences includes spearheading the advancement program for Shanghai American School and working with both St. Paul's Schools in Baltimore, Maryland.

Chris Koler

Managing Director of Investments, The Community Foundation for Greater New Haven

Chris Koler, CAIA is the Managing Director of Investments responsible for the due diligence, analysis and oversight of The Foundation's charitable assets.

Chris began his career at a trading desk in Chicago for Goldman Sachs, specializing in interest rate and equities derivatives, spent time working for an investment management consultant in CT and worked at a corporate restructuring and bankruptcy firm in NYC. Prior to working at CFGNH, Chris worked for over a decade at The Church Pension Group, a financial organization serving The Episcopalian Church, where he worked primarily on the Fixed Income portfolio and building out a specialized sleeve of opportunistic and idiosyncratic investments.

Chris grew up in Shaker Heights, Ohio and is a graduate of Wesleyan University, where he earned a B.A. in English. He also holds the professional designation of Chartered Alternative Investment Analyst (CAIA). In 2022, he was recognized by Chief Investment Officer as an innovative asset allocation leader as a member of the Class of 2022 NextGens.

He and his wife Mallika currently live in Madison with their three children.

Faculty Bios

Delicia Nahman

Director of Sustainability, Lafayette College

Delicia Nahman is a sustainability strategist with 20 years of experience catalyzing sustainability and Net Zero thought leadership and facilitating organizational change management. In her current role as Director of Sustainability at Lafayette College, she guides progress toward carbon neutrality by 2035 across scopes 1, 2, and 3 and fully integrates sustainability efforts across the enterprise. Additionally, she works to develop effective partnerships and relationships with surrounding communities and institutions to advance sustainability throughout the region. In recent years, Nahman has aimed to leverage her expertise to advance long-term investments in support of a more just and decarbonized future. She serves as the Co-Chair of the Intentional Endowment Network's Net Zero Working Group.

Before joining Lafayette College, Nahman was the founding Director of Lehigh University's Office of Sustainability. She spent nearly 10 years creating and leading strategic planning to infuse sustainability throughout operations, curricula, and campus life. Previous to Lehigh University, Nahman served as a sustainability coordinator for the Los Angeles Community College District. She started her sustainability journey at UC Berkeley where she worked with campus stakeholders to pass a Clean Energy and Green Building Policy and an award-winning for-credit course across five UC campuses focused on experiential learning to advance campus sustainability efforts.

She received a BA and BS from UC Berkeley and an MBA in Sustainability with an Impact Finance concentration from Bard College.

Dr. Amir Pasic

Eugene R. Tempel Dean, Indiana University Lilly Family School of Philanthropy

Amir Pasic is the Eugene R. Tempel Dean of the Indiana University Lilly Family School of Philanthropy, the world's first school devoted to research and teaching about philanthropy.

Prior to joining the school, Pasic was vice president of international operations at the Council for Advancement and Support of Education (CASE), a global professional association serving educational institutions and their advancement professionals. Previously, Pasic was associate dean for development and strategic planning at the Johns Hopkins University School of Advanced International Studies (SAIS) as well as executive director of its Foreign Policy Institute, where he continues to serve as a fellow.

Pasic served as deputy director of the world security project at the Rockefeller Brothers Fund and was deputy vice president for advancement at The George Washington University. A former librarian at the Library of Congress, he began his career with faculty appointments at Brown University's Watson Institute.

Pasic earned his doctorate in political science at the University of Pennsylvania. He holds a master's degree in international relations from Johns Hopkins University and a bachelor's degree in economics and political science from Yale University.

Anthony Peretore, CFA, CAIA

Managing Director, Commonfund OCIO

Anthony Peretore is a member of the Commonfund OCIO Investment team and is responsible for the design, tailoring and, implementation of custom investment solutions for clients through asset allocation recommendations, portfolio oversight and analysis, and tactical rebalancing of client portfolios. Prior to joining Commonfund, he worked as a convertible securities analyst for BCP Securities in Greenwich, CT. His primary responsibilities included analyzing company credit profiles and capital structures, making security recommendations and establishing new client relationships. Anthony received his B.A. in Political Science and a Business minor from Saint Joseph's University. He also holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations.

Dr. Charles B.W. Prince

Transformation & Sustainability Officer, Dillard University

Charles B.W. Prince, Ed.D., is the Chief of Staff & Chief Transformation and Sustainability Officer at Dillard University in New Orleans, LA. Dr. Prince is responsible for ensuring operational excellence, student experience, board relations, and strategic external partnerships. Since joining higher education 15 years ago, he has worked at institutions in the U.S., UK, Africa and Ireland, including three HBCUs. Since joining Dillard, he has raised over $5M in external grant funding. Before joining Dillard in January 2023, he served as Associate Vice President for Research and Innovation at Virginia Union University in Richmond, VA. In his spare time, he enjoys playing tennis, cycling, and shooting/archery.

Roshell Rinkins

VP/Grants Administration and Chief DEI Officer, Knight Foundation

Roshell R. Rinkins, a Fort Lauderdale native, has built a mastery in strategic sourcing, procurement, and supply-chain management honed at some of the nation's top companies, including Apple, Procter & Gamble (P&G), Microsoft, and Goldman Sachs. As Vice President of Grants Administration and Chief Diversity, Equity, and Inclusion (DEI) Officer at the John S. and James L. Knight Foundation, she develops and executes systems, policies, and management tools that advance the grantmaking at the foundation. In her DEI capacity, Roshell is responsible for driving the foundation's core belief of engaged, equitable, and inclusive communities into every aspect of Knight's work.

Roshell currently Chairs the Foundation Leadership Circle, sits on the board of the Florida Philanthropic Network, is a member of Pipeline Angels cohort and served on several advisory committees including Peak Grantmaking where she provided high-level strategic guidance and thought partnership. Roshell was recently selected to participate in Harvard Business School's Young American Leaders Program that immerses leaders from over a dozen cities who commit to making their communities more inclusive, prosperous, and successful.

Born to Haitian immigrants, Roshell earned both her Bachelor of Science and MBA degrees from Florida A&M University. Her expertise has been featured in various media outlets including Nasdaq, the Huffington Post, several business/entrepreneurship related podcasts, among others.

Faculty Bios

Dani Robbins

Director of Governance Strategy, BoardSource

As the Director of Governance Strategy, Dani leads the educational strategy for BoardSource, focused on developing and delivering relevant and engaging educational programs and products that strengthen board leadership functions and practices. Dani works across teams to ensure that BoardSource's offerings are aligned with the organization's leadership priorities, research findings, and sector-wide leading practices. She oversees the design, development, implementation, and evaluation of educational programs, including the Board Support Program, BoardSource's core board development program.

Prior to joining BoardSource, Dani served as the Director of the Nonprofit Administration graduate programs at John Carroll University where she taught nonprofit governance, leadership and management. She also founded and led Non Profit Evolution, a consulting firm providing nonprofit governance, strategy, and coaching services.

Her education includes a Master's Degree in Public Administration from the Levin College of Urban Affairs at Cleveland State University, and a Bachelor's from Kent State University. She is also a graduate of Leadership Akron Class 22 and the Boys & Girls Clubs of America's Advanced Leadership Program, offered in conjunction with the University of Michigan's Ross School of Business.

Dani has served as the chief executive of two domestic violence shelters/rape crisis centers and two Boys & Girls Clubs, and introduced the Women's Coalition – the prelude to the Women's Center – at Case Western Reserve University.

Dani received the Vision and Spirit Award from Boys & Girls Clubs of America in 2006 and was included as a Notable Women in Nonprofits by Crain's Cleveland Business in 2019.

Dani is also a speaker and trainer, the co-author of the Innovative Leadership Workbook for Nonprofit Executives, the author of a blog on issues relating to nonprofit organizations, and formerly a Network for Good fund raising coach, the nonprofit expert on answers.com and an instructor at the John Glenn College of Public Affairs at The Ohio State University.

Advancing social justice is her life's work.

James Scheinberg

Managing Partner, Founder & Chief Investment Officer, North Pier Search Consulting

Born and raised in the North Suburbs of Chicago, Jim Scheinberg came to Southern California in 1987 to pursue his B.A. in Political Science at University of California, Los Angeles. He achieved the Certified Investment Management Analyst (CIMA®) designation in 2001 from The Investment Management Consultants Association (IMCA®) in conjunction with the Wharton School of Business of the University of Pennsylvania. He has also earned the Accredited Investment FiduciaryTM (AIF®) and Accredited Investment Fiduciary AnalystTM (AIFA®) designations, awarded by the Center for Fiduciary Studies, which is associated with the Joseph M. Katz Graduate School of Business of the University of Pittsburgh. He also earned the PLANSPONSOR Retirement Professional designation (PRP) from the PLANSPONSOR Institute and sits on the Steering Committee of The Center for Due Diligence. He is a quoted resource to journalists, a regular guest expert on a syndicated radio and a regular speaker at industry conferences. Jim also regularly serves as a consulting expert for U.S. government regulatory agencies and as an expert witness for Federal ERISA litigation.

Jim Scheinberg began his career in venture capital in 1990 moving to general securities with Smith Barney Harris Upham in 1992. He joined Oppenheimer & Co., Inc. in 1994 as an Associate in the Oppenheimer Consulting Group, the firm's institutional investment management consulting department, where he worked with sponsors of trustee-directed plans and other institutional clients. In 2001, Jim founded what would become the Corporate Services Group of Oppenheimer Co., Inc. (CSG), where he eventually held the position of Director and Senior Vice President. CSG was an industry pioneer in providing conflict free, fee-only investment consulting and fiduciary advocacy for institutional, participant-directed plan sponsors. In 2008, Jim and CSG Partner Brant Griffin founded North Pier Fiduciary Management LLC. His tenure in the industry has also included experience in hedging and monetization, corporate executive services, and corporate cash management.

Mamak Shahbazi

Vice Chair, Commonfund Board of Trustees

Mamak Shahbazi is a seasoned investment executive with a 35-year track record of raising assets, building and managing high-performance marketing and client service teams, developing business, maintaining key client and consultant relationships, overseeing and delivering impressive growth and ROI. A Founding Member of Colchester Global Investors, which provides a complete range of investment management services for global and emerging market bonds, Mamak was the company's President, Director and Global Head of Marketing From 2001 to 2019. She was responsible for growing assets under management from $15 million to $43 billion since inception. Mamak is accomplished in the effective execution of both short and long-term deliverables. She is a team player with demonstrated success in the development and motivation of staff and the nurturing and maintenance of relationships with prospects, clients from diversified categories in the US and around the world, and industry participants. Mamak has built Colchester's marketing and client service structure globally, with offices in New York, London, Singapore, Australia and soon in the United Arab Emirates. Her client service efforts resulted in the firm receiving the Greenwich Associates prestigious Quality Leader in Institutional Client Service award. A keen determination to provide clients with optimal solutions to their investment needs, combined with a background in engineering and years of experience in fixed income research and analysis, has made Mamak extremely effective as a solution provider to institutional investors. An invited guest speaker at various prominent investment conferences, Mamak has presented at the ABANA Annual Conference 2016 on Leading Women in Finance, the Mangham Associates (endowment management firm) Client Conference 2015, and The Salvation Army South Investment Conference 2014 and 2012. Additionally, Mamak was a Founding Angel Member of 100 Women in Finance, a global network of investment professionals working to assist women at every stage of their careers. Prior to Colchester, Mamak built an impressive record in the investment community. She served as Director of Institutional Marketing at the hedge fund firm Zweig-DiMenna Associates, where she was responsible for building the institutional marketing and client services effort. She raised over $500 million in assets under management despite stressed market conditions and performance.

Faculty Bios

Rosalie Sheehy-Cates

Senior Advisor, Philanthropy Northwest, The Giving Practice

Rosalie Sheehy Cates helps United States foundations investigate, design and implement impact investing strategies. Rosalie has written two investment-focused reports on racial equity as part of foundation investing, and she is active in industry collaboratives, often focused on fiduciary duty, affordable housing, and regenerative food systems.

Rosalie was CEO of a $45 million nonprofit loan fund in Montana for 14 years. She lived in Wisconsin during the 1980s, where she was an organizer for family farms and sustainable agriculture and helped with her family's small cattle operation. She now lives in Missoula, Montana, where she reads and walks a lot, and has served as vice-chairperson of the board of Headwaters Foundation.

Rachel Stavola Clivaz

Associate Director, Commonfund OCIO

Rachel Stavola Clivaz is a member of the Commonfund OCIO Investment team and is primarily responsible for assisting in the design, tailoring and implementation of custom investment solutions for clients, as well as client portfolio analysis and specialized analytical requests. Prior to joining Commonfund, Rachel attended undergraduate school at Fordham University where she graduated with a B.S. in Business Administration and a minor in Mathematics.

George Suttles

Executive Director, Commonfund Institute

George Suttles leads Commonfund's educational, thought partnership, and professional development activities as Executive Director of Commonfund Institute. He serves on multiple advisory boards and steering committees, including Intentional Endowments Network's (IEN) steering committee which provides strategic guidance to the network and chairs the steering committee for the Impact Finance Center's Diverse Manager Initiative.

Prior to joining Commonfund, George was a Program Officer at the John A. Hartford Foundation, an independent, national private foundation focused on improving care for older adults. Before joining the foundation, he was a Vice President, Senior Philanthropic Relationship Manager at U.S. Trust/Bank of America. In this role he worked with private and institutional clients on issues related to best practices in governance and strategic grantmaking. He is a member of numerous nonprofit boards including Laundromat Project (Chair) and the New York Foundation, where he serves as Treasurer and chair of the investment committee. George is frequently asked to speak on topics concerning fiduciary duty and stewardship, philanthropy, investment governance, Diversity Equity and Inclusion and values aligned investing, among other topics.

Currently, he is on the Adjunct Faculty at the New York University (NYU) School of Professional Studies, teaching classes on private and corporate philanthropy. George received a B.A. from Wesleyan University, an M.A. in Philanthropic Studies from Indiana University Lilly Family School of Philanthropy (IUPUI) and an M.P.A. from Baruch CUNY School of Public Affairs.

Jay Van Bavel

Professor of Psychology & Neural Science; Affiliate; Director; NYU; Stern School of Business in Management and Organizations; Social Identity & Morality Lab

Dr. Jay is the co-author of "The Power of Us: Harnessing Our Shared Identities to Improve Performance, Increase Cooperation, and Promote Social Harmony". Prior to joining NYU, he completed his PhD at the University of Toronto and a Postdoctoral Fellowship at The Ohio State University.

From neurons to social networks, Jay's research examines how collective concerns—group identities, moral values, and political beliefs—shape the mind, brain, and behavior. His work addresses issues of group identity, social motivation, cooperation, implicit bias, moral judgment, decision-making, and social media. He studies these issues using a combination of neuroimaging, lesion patients, social cognitive tasks, economic tasks, cross-cultural surveys, and computational social science.

Jay has given talks at dozens of the Psychology Departments and Business Schools, as well as academic conferences, professional events, and non-academic organizations (including the World Science Festival). He has published over 100 academic publications and co-authors a mentoring column, called Letters to Young Scientists, for Science Magazine. He has written about his research for the New York Times, BBC, Scientific American, Wall Street Journal, LA Times, and the Washington Post and his work has appeared in academic papers as well as in the US Supreme Court and Senate. His research was also featured in TEDx and TED-Ed videos and he has consulted with the White House, United Nations, European Union, and World Health Organization on issues related to his research.

His full bio and CV can be found at www.jayvanbavel.com.

Allan Weinstein

Managing Partner, Co-founder, Gainline Capital Partners

Allan Weinstein is the Firm's Managing Partner. Prior to co-founding Gainline in 2015, he was a Managing Partner of CAI Private Equity ("CAI"), which he joined in 2012. While at CAI, Allan served on the firm's Investment Committee and was a partner in CAI's management company. Before joining CAI, Allan was a Managing Director at Lincolnshire Management, Inc. There, he served for nearly 18 years and had significant responsibility for successful investments in numerous sectors, including business services, specialty manufacturing, financial technology, transportation, logistics and reverse logistics, direct marketing and consumer products. Among other responsibilities at Lincolnshire, he served as interim Chief Financial Officer of a portfolio company and led a transaction that in 2007 won Private Equity Deal of the Year from the Los Angeles Venture Association. Allan began his career with Fleet Bank, where he completed a management and credit training program. He serves and has served as a director or officer of numerous companies, including Galaxy Universal, Core Health and Fitness, Source Advisors, CSAT Solutions, Prince Sports, Bankruptcy Management Solutions and Shred-Tech Corporation. He also previously served on the Board of Wireless Telecom Group, Inc. (NYSE: WTT). He received a B.A. in History and Economics from Vassar College.

Faculty Bios

Tim Yates

President and CEO, Commonfund OCIO

Timothy T. Yates, Jr. heads Commonfund OCIO and is responsible for managing all aspects of Commonfund OCIO's business, which focuses exclusively on non-profit institutions. In this role, he leads a team of professionals that advise, implement and monitor custom investment solutions for institutions with total assets under management of more than $15 billion. Tim is a member of the Commonfund OCIO Executive Group and serves on both the Commonfund Asset Allocation and Operating Committees. Tim joined Commonfund as an associate in the CF Private Equity Associate Program. In 2003, he was a founding member of Commonfund's OCIO platform, where he was responsible for the design, tailoring and implementation of total portfolio solutions. Additionally, he held several roles with Commonfund CF Private Equity including having responsibility for custom accounts and serving as a senior member of the firm's emerging markets private equity portfolio leadership team with a focus on Latin America. Before joining Commonfund, Tim was an instructor of Spanish and Italian at Fordham Preparatory School in the Bronx, NY. He holds an M.B.A. in Finance with a designation in International Business from Fordham University and a B.A. in Modern Languages from Trinity College. Tim is a member of the investment committee for St. Paul's Church in Fairfield, CT, the Advisory Board of Girls Who Invest, and the Board of Directors of Caroline House, a non-profit in Bridgeport, CT, focused on enabling women and children to reach the fullness of their potential through education in English language and life skills.

Notes

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