



THE INVESTMENT STEWARDSHIP ACADEMY

June 8 - June 11, 2025 | New Haven, Connecticut
Yale University - Greenberg Conference Center

The Preview Planner

Commonfund Institute's Investment Stewardship Academy is an intensive three-day program that focuses on the essential principles and practices of stewarding long-term capital in a complex investment environment. Sessions explore topics such as governance, leadership, endowment management, investment strategy, risk, diversity and sustainability.

Agenda At-A-Glance

Sunday, June 8th

2:00 PM	Yale University Campus Walking Tour (Optional)
2:00	Registration - The Blake Hotel Lobby
5:30	Opening Dinner

Monday, June 9th

8:00 AM	Breakfast
8:30	Welcome Remarks and Program Review
8:45	The State of Nonprofit Institutional Investing and What to Consider for the Future
9:45	Break
10:00	The Evolution of Governance: Stewardship, Strategy, and Growth
11:00	The Most Important Investment Decisions: Governance, Liquidity, and Asset Allocation
12:00 PM	Lunch
1:00	Reimagining Spending as a Tool for Mission-Oriented Endowment Management
2:00	Break
2:30	Evolving Challenges in the Endowments and Foundations Space: Are we prepared?
6:00	Dinner

Tuesday, June 10th

8:00 AM	Breakfast
8:30	Connecting the Dots: Best Practices in Endowment Fundraising, Finance, and Investment Stewardship
9:30	Break
9:45	How Inflation Impacts an Institution's Ability to Fund Its Mission
10:45	Private Equity Manager Due Diligence Case Study
12:00 PM	Lunch
1:00	Trends and Opportunities in Private Markets
2:15	Break
2:45	KEYNOTE From Chaos to Clarity: Strategies for Leading Through Change and Uncertainty Michael J. Sorrell, Paul Quinn College
6:00	Dinner

Wednesday, June 11th

8:00 AM	Breakfast
8:30	Mission-Aligned Investing: A Fiduciaries Guide
9:30	Considerations for OCIO
10:30	Break
10:45	Strategy Workshop: A Roadmap for the Future
11:45	Reflection & Summary
12:00 PM	To-go Lunch & Depart

Keynote Speaker



Michael J. Sorrell, Ed. D.

Visionary Leader, Institutional Change Agent, President of Paul Quinn College

In 2007, Dr. Michael Sorrell faced a life-altering decision. He was part of an ownership group that was on the verge of purchasing the NBA's Memphis Grizzlies and he would serve as the team's president following the completion of the deal — a dream come true for him. At the same time, he was approached by Paul Quinn College, a failing institution, to serve as the historically Black college's president in the interim while they sought out a permanent appointment to take over the role — a search that was proving difficult as the school continued to falter. Dr. Sorrell accepted the role, hoping it would be a brief side quest on his journey to becoming an NBA executive. In reality, it marked the beginning of a transformative and innovative era for the school that continues to this day. Dr. Sorrell has spearheaded one of the great turnaround stories of our time — leading Paul Quinn's evolution from one of the

worst in the nation to a higher education powerhouse. As the longest-tenured president in the college's history, he has instilled a "WE Over Me" mentality in students, faculty, and the community at large and has been revered throughout his historic tenure for his ability to reimagine organizations to better serve the needs of the people that depend on them. He is a testament to the power of purpose and vision.



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Pricing and Travel Notes

Standard tuition for the program is \$3,500; \$3,000 for Commonfund investors. Tuition covers the cost of course materials and all meals. Participants are responsible for travel, hotel and personal expenses.

Commonfund has reserved a block of rooms at The Blake Hotel - New Haven, CT, for the rate of \$244 per night plus 15% tax.

To view additional program details, visit www.commonfund.org/ISA2025. Registration is by invitation only to representatives of eligible institutions. If you are unable to log in and register, please email cfinstitute@commonfund.org.



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Stewardship Academy**