



# THE INVESTMENT STEWARDSHIP ACADEMY

June 7 - 10, 2026 | New Haven, Connecticut  
**Yale University - Greenberg Conference Center**

## 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, spending policy and sustainability.

## Agenda At-A-Glance

### Sunday, June 7th

2:00 PM	Yale University Campus Walking Tour
2:30	Registration - Omni Hotel Lobby
4:00	Movie Screening: <i>Uncharitable</i>
6:00	Casual Welcome Dinner Reception

### Monday, June 8th

8:30 AM	Welcome Remarks and Program Overview
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	Planning for an Uncertain Future: Investment Stewardship Crisis Playbook
12:00 PM	Lunch
1:00	Reimagining Spending as a Tool for Mission-Oriented Endowment Management
2:00	Break
2:30	Featured Session   Investing Masterclass
6:00	Dinner

### Tuesday, June 9th

8:30 AM	Connecting the Dots: Best Practices in Endowment Fundraising and Investment Stewardship
9:30	Break
9:45	Optimizing Portfolio Construction Through Manager Selection
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	Fireside Chat with Dan Pallotta, Author and Entrepreneur
6:00	Dinner

### Wednesday, June 10th

8:30 AM	Unlocking Impact: Diverse Approaches to Mission-Driven Investing
9:30	OCIO Panel: Considerations for Strategic Partnership
10:30	Break
10:45	Strategy Workshop: A Roadmap for the Future
11:45	Reflection & Summary
12:00 PM	Grab-and-Go Lunch & Depart

## Keynote Speaker



### Dan Pallotta

Author and Entrepreneur

Dan's flagship talk about how the way we think about charity is dead wrong. Based on Dan's book, "Uncharitable".

"Uncharitable" brings Dan's big ideas about liberating the nonprofit sector to the big screen in an incredibly moving and persuasive feature-length movie.

This is the most powerful tool ever created for changing the minds of staff, board members, donors, volunteers and everyone else you need on your team to go after the big dreams you have for changing the world around you.

"Uncharitable" re-shuffles our old notions about saints and sinners, heroes and heretics, good and greed. It follows the stories of three record-breaking entrepreneurial charitable initiatives that were mercilessly attacked by the media, ultimately devastating the very people the initiatives were helping. It builds on Dan's book and TED Talk on charity, which was voted the single most persuasive TED talk of all time by the TED community.

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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 Omni New Haven at Yale - New Haven, CT, for the rate of \$176 per night plus tax. Information on how to book your accommodations is provided once registration is complete.

To view additional program details, visit [www.commonfund.org/ISA2026](http://www.commonfund.org/ISA2026). Registration is by invitation only to representatives of eligible institutions. If you are unable to log in and register, please email [cfinstitute@commonfund.org](mailto:cfinstitute@commonfund.org).



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