

# WELCOME

## WELCOME TO SOCIAL CAPITAL MARKETS 2008

This is the first comprehensive, global gathering of socially focused venture funds the world has ever seen.

Social investors are here from six continents, from South Africa, Ethiopia, and Mali, from the UK, Denmark, the Netherlands, from Brazil, and Nicaragua, from Hong Kong, Thailand, Korea, from Australia, and of course from across the United States.

Our goal with this conference is simple: we want to show the watching world that the social capital space is real, that it's big, that it's growing, and that, despite, or perhaps even because of the meltdown in the traditional capital market, this can be a safer long term place to put your money and your hopes for the future.

Call it blended value, call it philanthrocapitalism, call it social investing. Whatever you call it, it's a wave, with equal parts movement and emerging asset class, and it's coming together even as traditional investment vehicles, focused only on financial return without thought for social or environmental impact, are crashing around us.

Nearly all the significant social venture funds are here, along with venture philanthropy funds, as well as representatives of the largest foundations, and groups from the Federal Reserve, to U.S. government international development agencies, to the United Nations Development Program, as well as students, academics and consultants. With a sense of urgency and experienced optimism, we are all part of something new, something important. Something the world needs now.

We are thrilled to have as our keynote speaker the leading researcher in the space, Katherine Fulton of the Monitor Institute. Joining her are author and Economist reporter Matthew Bishop and Asad Mahmood of Deutsche Bank. Each of these three brings a unique breadth of expertise and depth of understanding to the intersection of money and meaning.

Welcome to the Social Capital Market. You are part of making it happen. Lend your voice, your time and your capital and together we can build the world we all want.

**KEVIN D. JONES | CONVENER & PRODUCER**  
SOCAPO8

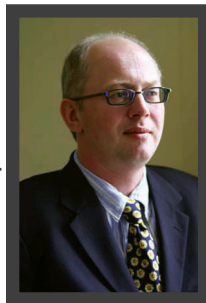
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Katherine Fulton



Matthew Bishop



Asad Mahmood



Kevin Jones



# CONNECTIONS AT SOCAP08

## SOCAP08

Is About Making Connections\*

Since the social capital market is still new and still forming, SOCAP08 is about making connections, helping attendees to make sense of the rapidly expanding wave of investing for return and social impact. At first glance, the arena may seem overwhelming in its complexity, daunting and chaotic. But if you will join us in this exploration and discovery, if you're willing to take a breath and get to know the other people in the room, you'll find that, just like you, they're here to make a difference — and to do it together.

Because the social capital market brings together so many people from so many areas — ranging from foundations, venture and angel investing to international development — we have provided special tools and enlisted experts to help you find your way, translate the insider lingo, and help you to meet the people and partners you're looking for.

### CONNECTION CONCIERGES

First and foremost are the Connection Concierges, an exceptional, carefully-selected group of MBA students who will be onsite to help ensure you find the information and people that can help make this a successful event for you. You'll find the Concierges at or near the Registration desk on each day of the event, and wandering around looking for you to ensure that you're finding what you need.

The Connection Concierges are trained to help you with two things:

#### 1: DECIPHERING JARGON

The phrases insiders toss off like, "If the BOP doesn't go beyond MFI to reach the SME we're SOL." Don't be shy: Ask a Concierge to help explain any terms that are unfamiliar to you. This stellar team has also created an online glossary to help you navigate the lingo as well.

[www.socialcapitalmarkets.net/lingo.php](http://www.socialcapitalmarkets.net/lingo.php)

#### 2: MATCHMAKING

Using online surveys filled out by attendees, which are in turn linked to a searchable database, we'll help you figure out who your potential partners are, and which investors, donors or entrepreneurs care about the regions and industry sectors you care about, from technology to microfinance, from South America to the U.S. If you're looking for help with marketing, fundraising, due diligence in a particular area, or anything else, searching the attendee profile database can help you find the answer. The attendee database will also be linked to a special SOCAP08 version of our Xigi maps {[xigi.net](http://xigi.net)} that will display the connections between attendees and their organizations.

Because we see this matchmaking process a core to the event, IDEO, the leading design firm, will also lead a session on Tuesday to help you get to know more about your fellow attendees and what they are doing.

### LOOK FOR THE T-SHIRTS

If you've got a question, just look for someone in the SOCAP08 Staff t-shirt. They can help you find what you need.



### FACEBOOK AND LINKEDIN

There are also groups on Facebook (Social Capital Markets Conference 2008 group) and LinkedIn (search for Social Capital Markets) created by our amazing team of more than 20 volunteers that let you see another side of your fellow attendees.

facebook

LinkedIn®

## MONDAY AND TUESDAY: PARTIES WILL HELP YOU CONNECT

On Monday night, party-goers will be asked to take sticky-notes and place themselves on the Social Impact Landscape created by the **McKinsey | Calvert | Good Cap** collaboration (see below), people will be able to see the landscape of who's attending **SOCAPO8** and what their areas of interest and activity are, from asset class to industry sector. On Tuesday, the room for the party will be divided into a similar landscape so that interest groups can more easily congregate.

## WEDNESDAY: PARTICIPANT-LED SESSIONS

Our third and last day together will be a complete divergence from the traditional listener/learner model, turning the process into an active conversation. Together, the attendees will focus on next steps and further conversations. Plan to stay through Wednesday because it could be the most valuable time you spend at the conference. It's about the people in the hallway, the ones you've come to see and to meet. Come and be part of taking it further. Make a suggestion for a group you'd like to convene. Our experienced facilitators will help us do that face-to-face, and make connections that can help this exciting world of social capital markets continue to grow.

- \* **TAKE ADVANTAGE OF THE ASSEMBLED BRAINS AND MEANS**
- \* **PURSUE INITIATIVES, TEST IDEAS, FIND PARTNERS**
- \* **TURN THE FIRST COUPLE DAYS' ENERGY INTO ACTION**

## LEARNING TOOLS

### SOCIAL CAPITAL LANDSCAPE MAP:

We've also provided learning tools to create context, including maps we have built to help you put this event and this emerging market into context. Among those tools is a landscape that makes sense of the risk return and social impact tradeoffs in this new kind of investing, and compares it to traditional investing and giving. It was created by a collaboration of thought leaders: Shari Berenbach from Calvert Social Investment Foundation {[calvertfoundation.org](http://calvertfoundation.org)}, Laura Callanan from McKinsey & Company {[mckinsey.com](http://mckinsey.com)} and Kevin Jones of Good Capital {[goodcap.net](http://goodcap.net)}. In addition, that team has created a Social Impact Landscape to help connect people working in specific vertical fields, from fair trade to information technology.

### NEW RESEARCH, NEW BOOK:

The Federal Reserve has also been researching and mapping "blended value investing" (another name for the Social Capital Market) and they will be speaking and distributing their research. Matthew Bishop, The Economist reporter who's just written a new and important book, **Philanthrocapitalism: How the Rich Can Save the World**, will be on hand to help explain what's new and important.

### SOCIAL CAPITAL INDEX:

Our partners Jason Rissman and Andrea McGrath have created a searchable online Social Capital Index {[www.socapindex.com](http://www.socapindex.com)} that lists the social venture funds working in this space, how much they have raised, and the sectors and geographic areas in which they are working, and the companies they have invested in.

Welcome to **SOCAPO8**. Building connections, and guided by the maps and tools we have created, our goal is to show that the social capital market is real, that it's bigger than we all knew, that it's growing in the midst of the downturn, and that it may be the safest place to put your money and your hopes.

The Social Capital Market is about making connections, between your money and meaning and between the people here trying to do the same thing. Thanks for joining us.

### THE SOCAPO8 PRODUCERS

- » KEVIN JONES
- » GARY A. BOLLES
- » HEIDI KLEINMAUS
- » ROSA LEE HARDEN

### ASSOCIATE PRODUCER

- » AMY BENZIGER

# DAY ONE \* MONDAY \* OCTOBER 13

## MONDAY OVERVIEW

11:00am	REGISTRATION OPENS
1:00pm - 3:00pm	SESSIONS
3:00pm - 3:30pm	BREAK
3:30pm - 6:30pm	SESSIONS
6:30pm - 8:00pm	RECEPTION

## PLENARY SESSIONS: FORT MASON CONFERENCE CENTER

### 1:00pm | Opening Address | KEVIN JONES, GOOD CAPITAL

Kevin Jones, Principal at Good Capital and Founder of **SOCAPO8**, kicks off the conference by laying out the landscape of the social capital market: who is here, why we're here and why it matters. Major underwriter of **SOCAPO8**, Harry Halloran of Halloran Philanthropies gives a welcome.

### 5:00pm | Round Up | KEVIN JONES, GOOD CAPITAL

Kevin recaps the day and provides a roadmap for the rest of the conference.

### 5:10pm | Keynote Address | ASAD MAHMOOD, DEUTSCHE BANK

Mark Beam, from Xigi.net, will introduce Asad Mahmood, who will speak about Social Investing: a global perspective on what's new and what's changing from a leading practitioner.

### 5:45pm | Capital Networking | CONNECTIONS CONCIERGE TEAM

The [assetmap.org](http://assetmap.org) Connections Concierge team will help **SOCAPO8** participants to expand their networks to find new people and organizations with common interests and complimentary needs. These new relationships will also provide a context for the "Capital Collaboration" session facilitated by IDEO on Tuesday morning.

### 6:30pm | Reception Opening | HERBST PAVILION

Tony Carr, Executive Director of Halloran Philanthropies, will open the reception with a welcome message. Following a brief introduction to the Social Capital Landscape you'll be invited to put yourself on the map.

### 6:40pm - 8:00pm | Reception | HERBST PAVILION

Enjoy food and drinks while mingling with new friends. Sponsored by Halloran Philanthropies, whose mission is to create a healthy world community that promotes economic development and human dignity guided by ethical principles.

## 101 TRACK: GOLDEN GATE ROOM

\*What is this whole social investing thing about?  
What's the history? How is it different from other kinds of investing and from traditional philanthropy?

### 1:30pm | Panel | SOCIAL CAPITAL MARKETS 101

- Moderator: Eric Nee, [Stanford Social Innovation Review](#)

- Josh Becker, [New Cycle Capital](#)
- Tim O'Shea, [CleanFish](#)
- Lloyd Kurtz, [Nelson Capital](#)

An introduction to the vehicles that enable you to make your money do good, evolving ways to look at impact and return, and the players who are making a difference in the emerging capital market.

### 2:15pm | Panel | SOCIAL INVESTING 101

- Moderator: Regina Connell, [Salt Cellar Group](#)
- R. Paul Herman, [HIP Investor Inc.](#)
- Andrew Kassoy, [B Lab](#)
- Steve Godeke, [Godeke Consulting](#)

A primer on how to make your money make an impact, choosing the right investments based on your goals, accelerating change, and measuring results.

### 3:30pm | Panel | SOCIAL ENTERPRISE 101

- Moderator: Cheryl Dahle, [Ashoka](#)
- Jim Schorr, [Center for Responsible Business, Haas/UC Berkeley](#)
- Sara Olsen, [Social Venture Technology Group](#)
- Jonathan Storper, [Hanson Bridgett](#)

How social entrepreneurs are finding new ways to use the market to make a positive impact on the world. Get the basics on how social enterprises work, grow and thrive.

### 4:15pm | Panel | MONEY & MEANING

- Lucy Beholtz, [BluePrint R&D](#)
- John Goldstein, [Imprint Capital Advisors](#)
- Will Rosenzweig, [Physic Ventures](#)

Discover how investors are rethinking the meaning of money through new perspectives on investment, philanthropy and (most importantly) the overlaps between the two.

## NEW WEALTH MANAGEMENT TRACK: MARINA ROOM

\***Staying in the loop when your clients want to move away from purely market rate investing to adding social impact to their investment portfolio.**

### 1:30pm | Panel | NEW WEALTH MANAGEMENT

- Moderator: Sean Stannard Stockton, [Tactical Philanthropy](#)
- Raul Pomares, [Guggenheim Partners](#)
- Patricia Farrar-Rivas, [Veris Wealth Partners](#)
- Elliot Berger, [Merrill Lynch](#)
- Maximilian Martin, [UBS](#)

Clients are demanding investment approaches that blend social impact and returns are creating challenges for wealth and investment managers across the world. Discover how leading wealth managers are meeting the demand, adding value, and driving results.

### 2:15pm | Panel | MISSION-RELATED INVESTING

- Moderator: Doug Bauer, [Rockefeller Philanthropy Advisors](#)
- Lisa Kleissner, [KL Felicitas Foundation](#)
- Carl Palmer, [Beartooth Capital](#)
- David Zapol, [FSG Social Impact Advisors](#)
- Dan Crisafulli, [Skoll Foundation](#)

Foundations are beginning to put a portion of their foundation's corpus (the 95% of assets that are invested) into line with their overall purpose. Innovative foundations and analysts explain trends and movements.

### 3:30pm | Panel | MARKET CREATORS

- Moderator: R. Todd Johnson, [Jones Day](#)

- Deb Dunn, [Stanford d.school](#)
- Mark Campanale, [Social Stock Exchange](#)
- Elise Lufkin, [Calvert Giving Fund](#)
- Andrew Kasso, [B Corp](#)

The emerging social capital market requires a new support system to reduce friction, increase trust, and accelerate growth -- from rating agencies to new legal structures to exchanges. Discover how the infrastructure's being built, and what is left to be done.

### 4:15pm | Panel | DEMOCRATIC CAPITAL

- Moderator: Melanie Swan, [MS Futures](#)
- Premal Shah, [Kiva.org](#)
- Mads Kjaer, [MyC4](#)
- Tracey Pettingill-Turner, [MicroPlace](#)
- Robert Chatwani, [Worldofgood.com / eBay](#)

Power to the money of the people. From Uganda to India to the US to the Internet, learn about the emerging platforms that enable the "average" person to make an impact with their investment dollars.

## SOCIAL ENTREPRENEUR TRACK: ROOM 370C

\***What does it take to build a business that can grow and become profitable yet stay focused on a social mission? Lessons from top practitioners.**

### 1:30pm | Panel | BUILDING A BUSINESS PLAN

- Kirsten Gagnaire, [Social Enterprise Group](#)
- Kevin Braithwaite, [RootSpace](#)

- Joe Sibilia, [CSRWire](#)

How to create a new type of business plan that's both a pragmatic roadmap to financial and social returns, AND a compelling, persuasive document for investors.

### 2:15pm | Panel | PITCHING YOUR ORGANIZATION

- Moderator: Tess Reynolds, [New Door Ventures](#)
- Ben Black, [New Cycle Capital](#)
- David Murphy, [Better World Books](#)
- Karyn Barsa, [Investors' Circle](#)

How to pitch investors, partners, and talent: getting into the minds of your audience; telling your story; communicating your difference and impact; and acing the close.

### 3:30pm | Panel | BUILDING A SUSTAINABLE, SCALABLE BUSINESS

- Moderator: Betsy Densmore, [Social Enterprise Institute](#)
- Alan Gershenfeld, [E-Line Ventures](#)
- Lauri Alpern, [ROI Ventures](#)
- Paul Lamb, [Man on a Mission Consulting](#)

How to create a business with high impact that pays the bills, grows in size and impact, but doesn't require constant fundraising.

### 4:15pm | Panel | LEARNING FROM SERIAL ENTREPRENEURS

- Moderator: Jim Hornthal, [CMEA Ventures](#)
- Jim Fruchterman, [Benetech](#)
- Xavier Helgeson, [Better World Books](#)
- Jeff Mendelsohn, [New Leaf Paper](#)

Tales from the trenches: real stories of how social entrepreneurs started, grew and scaled their businesses, overcame challenges, made money . . . and kept their sanity.

# DAY TWO \* TUESDAY \* OCTOBER 14

## TUESDAY OVERVIEW

7:00am	REGISTRATION OPENS
8:30am - 1:30pm	SESSIONS
1:00pm - 2:30pm	LUNCH
2:30pm - 6:30pm	SESSIONS
6:30pm - 8:00pm	RECEPTION

## PLENARY SESSIONS: COWELL THEATER

### 8:30am | Opening Address | KATHERINE FULTON, MONITOR GROUP

Katherine Fulton, an expert on new philanthropy and social investing, takes a look ahead at the future of social capital markets.

### 9:00am | Panel | SOCIAL CAPITAL MARKETS ROUNDTABLE

- » Moderator: Kevin Jones, [Good Capital](#)
- » Jed Emerson, [Blended Value](#)
- » Matthew Bishop, [The Economist](#)
- » David Chen, [Equilibrium Capital](#)

Perspectives on social investing from innovators, leading practitioners and thought leaders from the worlds of finance, social enterprise, and journalism.

### 10:00am | IDEO "CAPITAL COLLABORATION"

Begin turning new contacts from Monday into deeper connections by building empathy with your potential partners, learning how to accelerate relationships, and boosting your collaboration IQ.

### 5:00pm | Keynote | MATTHEW BISHOP, THE ECONOMIST

Matthew Bishop of The Economist discusses the theory behind his new book [Philanthrocapitalism: How The Rich Can Save The World](#) and highlights the effective ways new philanthropists are working to solve the world's most intractable problems.

### 5:30pm - 6:30pm | THE ECONOMIST DEBATE SERIES

Motion: This house believes you can maximize social returns by maximizing financial returns. Two voices for, two voices against.

## RECEPTION: HERBST PAVILION

### 6:45pm | RETROSPECTIVE

Tim Freundlich, Founding Partner at Good Capital and Senior VP at Calvert Foundation, will introduce Calvert Social Funds' Founding Chair, Wayne Silby. His topic will be the social capital market, where it's come from, where it is now, where it's going from here.

### 7:00pm | IDEO WRAP-UP

IDEO will showcase the results of the morning's "Capital Collaboration" exercise.

### 6:30pm - 8:00pm | RECEPTION

Enjoy food and drinks while mingling with new friends. Sponsored by GOOD Magazine to celebrate the launch of GOOD Business, the new semi-annual edition focusing on social enterprise and entrepreneurship, and by The Case Foundation.

## BREAKOUT: COWELL THEATER

### 11:00am | Panel | BEYOND MICROFINANCE

- » Moderator: Betsy Zeidman, [Milken Institute](#)
- » Derek Streat, [Unitus](#)
- » Jim Roth, [Leapfrog](#)
- » William Foote, [Root Capital](#)

Micro-loans were one of the first innovations to help lift people out of poverty. We look beyond MFI at new financial structures, technology, and services designed to help the people at base of the pyramid lift themselves.

### 12:05pm | Panel | NEW PRIVATE EQUITY FUNDS

- » Moderator: Scott Smith, [Hanson Bridgett](#)
- » Álvaro Rodríguez Arregui, [Ignia Partners](#)
- » Wes Selke, [Good Capital](#)
- » Christian Schattenmann, [Bamboo Finance](#)

There's a new breed of funds raising money from investors that blend social impact and financial return. Innovators discuss different strategies, challenges and opportunities.

### 2:30pm | Panel | BREAKING SILOS

- » Moderator: Katherine Fulton, [Monitor Institute](#)
- » Robin Hacke, [Living Cities](#)
- » David Erickson, [Federal Reserve of San Francisco](#)
- » Sahba Sobhani, [United Nations Development Programme](#)

The willingness to break down silos is the keystone of the new social capital movement. Learn how big, established players (from the UN Development Program to the Federal Reserve to a coalition of the

largest US foundations) are coming together to make sense of the emerging social capital market and create a new kind of impact, from urban America to the developing world.

### 3:35pm | Panel | FUNDING FOOD CHAIN

- » Moderator: Tim Freundlich, [Good Capital](#)
- » Karen Barsa, [Investor's Circle](#)
- » Patrice Scheider, [Media Development Loan Fund](#)
- » Don Shaffer, [RSF Social Finance](#)
- » Cynthia Massarsky, [Growth Philanthropy Network](#)

As the social capital markets mature, there's a new funding food chain – from foundations to syndicates to investors' circles, to social funds – that (like the traditional venture capital system) fills the investment needs of social enterprises through all stages of growth, including listing on stock exchanges.

## BREAKOUT: ROOM 260C

### 11:00am | Panel | DESIGN IN THE DEVELOPING WORLD

- » Moderator: Caroline Barlerin, [Sloan Fellow - Stanford](#)
- » Paul Polak, [International Development Enterprises](#)
- » Tim Brown, [IDEO](#)
- » Paul Hudnut, [Colorado State University](#)
- » Kristin Peterson, [Inveneo](#)

It's not just consumers in advanced economies who can benefit from design. Truly great design can improve lives, create economic opportunity, and lift people out of poverty across the world. Leading practitioners and entrepreneurs discuss how design can make the difference.

### 12:05pm | Panel | PITCHING IN ACTION

- » Moderator: Gary A. Bolles, [Xigi Media](#)
- » Mindy Aranoff, [BAVC](#)
- » Bob Cabeza, [Change Agent Productions](#)
- » Kevin Weston, [Youth Outlook Radio \(Yo! Biz\)](#)
- » Elisabeth Soep, [Youth Radio International](#)
- » Judge: Peter Crosby, [All Together Now](#)
- » Judge: R. Paul Herman, [HIP Investor Inc.](#)
- » Judge: Kevin Starr, [Mulago Foundation](#)

Four leading nonprofit organizations will pitch their respective youth and media ventures. This session may be of particular interest to investors, funders, and entrepreneurs.

### 2:30pm | Panel | BIG BROTHER OR BIG INVESTOR?

- » Moderator: Carla Javits, [REDF](#)
- » Jeff Kositsky, [Community Housing Partnership](#)
- » Tom Sheridan, [The Sheridan Group](#)
- » Andrew Wolk, [Root Cause](#)

The US federal government and several states are creating ways to make social enterprise and social investing the fuel for a new form of economic development.

### 3:35pm | Panel | VENTURE PHILANTHROPY AND INTERNATIONAL GOVERNMENT INVESTMENT

- » Moderator: Rob Katz, [Acumen Fund](#)
- » Jim Polan, [OPIC](#)
- » Sasha Dichter, [Acumen Fund](#)
- » Kojo Paris, [Social Private Equity South Africa](#)
- » Rob Schneider, [USAID](#)

International development is collaborating with venture philanthropy and social venture funds from Africa to redefine development and create new ways of working. Learn from practitioners what's working... and what's not.

## BREAKOUT: ROOM 362C

### 12:05pm | Panel | ICT FOR DEVELOPMENT

- » Moderator: Mark Beckford, [Disruptive Leadership](#)
- » David Edelstein, [Grameen Technology Center](#)
- » Ken Banks, [Kiwanja](#)
- » Marnie Webb, [Techsoup](#)
- » Dwight Wilson, [One Roof](#)

Technology is a path out of poverty and the key accelerant of development. Social entrepreneurs discuss innovative approaches, key challenges, and opportunities for sustainability, scalability and growth.

### 12:05pm | Panel | CLEAN AND GREEN

- » Moderator: KoAnn Skrzyniarz, [Sustainable Life Media](#)
- » Lana Holmes, [OM Direct](#)
- » Rob Lapides, [Pico Bonito](#)
- » Joshua Levine, [The Levine Social Investment Group](#), [UBS](#)

Entrepreneurs and investment professionals with clean investment experience discuss needs, opportunities, market trends, and how to maximize opportunity.

### 2:30pm | Panel | CAPITAL COHABITATION

- » Moderator: Shari Berenbach, [Calvert Social Investment Fdn.](#)
- » Tim Freundlich, [Good Capital](#)
- » George Overholser, [Nonprofit Finance Fund Capital Partners](#)
- » Marc Hand, [Public Radio Capital](#)

Dealmakers talk candidly about how they get grantors, development funders and equity partners to break down silos, collaborate, and make more money and more impact than if they'd gone it alone.

# DAY TWO \* TUESDAY \* OCTOBER 14 {CONTINUED}

## 3:35pm | Case Study | [ASSETMAP.ORG](#)

- » Moderator: Nathaniel Whittemore, [assetmap.org](#)
- » Danny Moldovan, [assetmap.org](#)

Every project is a puzzle, and the pieces are the ideas, skills, materials, relationships and other assets that must be leveraged for success. Join Nathaniel Whittemore and Danny Moldovan of [assetmap.org](#), the company behind the **SOCAP08** Connection Concierge program, to learn more about its platform, a pilot project in northern Uganda, and how organizing, visualizing, and sharing information about assets can improve your ability to get things done and enable sustainable social change.

## BREAKOUT: ROOM 205C

### 11:00am | Panel | [Online Communities](#)

- » Sundee Ahuja, [Awareness2Action](#)
- » Deron Triff, [Changents.org](#)
- » Ben Rattray, [Change.org](#)
- » Deb Berman, [Just Means](#)
- » Jill Finlayson, [SocialEdge](#)

Learn how Web 2.0 vehicles are effectively changing the landscape by creating new pathways for information flow, user participation and increased exposure for emerging change-makers.

### 12:05pm | Case Study | [IDEABLOB](#)

- » Moderator: Darren Sudman, [Ideablob](#)
- » Aaron Fleishman, [Mashavu](#)
- » Abigail Glaum-Lathbury, [Elmidae](#)
- » Natalie Carter, [The Earth Garden Project](#)

Darren Sudman, VP of Innovation at Advanta Bank Corp., helped launch Advanta's KivaB4B and ideablob initiatives. He welcomes three "blobbers" and aspiring social entrepreneurs in this interactive session to discuss the challenges and successes from the front lines of social entrepreneurship.

### 2:30pm | Panel | [UNLOCKING CONSUMER DEMAND FOR FAIR TRADE](#)

- » Moderator: Alison King, [Independant Consultant](#)
- » Regina Connell, [Salt Cellar Productions](#)
- » Gate Baril, [TransFair](#)
- » Scott Leonard, [Indigenous Designs](#)
- » Edouard Rollet, [AlterEco](#)

How do you affect consumer behavior and grow demand for Fair Trade? Fair trade leaders discuss their efforts to impact consumer awareness and accelerate growth against Fair Trade products.

### 3:35pm | Panel | [INVESTING IN FAIR TRADE](#)

- » Moderator: Paul Rice, [TransFair USA](#)
- » Priya Haji, [World of Good](#)
- » Greg Steltenpole, [Adina](#)
- » William Foote, [Root Capital](#)
- » David Griswold, [Sustainable Harvest Imports](#)

Fair Trade is fast becoming a play for investors. Entrepreneurs who've succeeded in gaining serious investor capital and experienced fair trade funders talk about why fair trade is becoming the next emerging sector of the social capital market.

## BREAKOUT: ROOM 210C

### 11:00am | Panel | [NEW FUNDING MODELS FOR NONPROFIT SOCIAL VENTURES](#)

- » Moderator: Paul Lamb, [Man on a Mission Consulting](#)
- » Laura Efurd, [ZeroDivide](#)
- » Jessica Margolin, [Institute for the Future](#)
- » Bob Cabeza, [Change Agent Productions](#)

As more investment dollars move into the for-profit social enterprise space, nonprofits are increasingly deploying their own earned income strategies. This session will examine up-and-coming nonprofit social venture funding models and discuss opportunities for a social market that combines the best of traditional for-profit and non-profit funding and support for social ventures.

### 12:05pm | Panel | [ACT DIFFERENTLY](#)

- » Moderator: Debra Dunn, [Stanford d.school](#)
- » Ron Gonen, [Recycle Bank](#)
- » Jonathan Greenblatt, [GOOD Magazine](#)
- » Dan Pallotta, [Pallotta TeamWorks](#)

Capital is a trailing indicator to a new way of thinking . . . from media to local currency to the founding of the AIDS Ride, this panel discusses what it took to get people to act and work differently, and the lessons for the future.

### 2:30pm | Panel | [SOCIAL ENTERPRISE IN NEARLY FAILED STATES](#)

- » Karen Doyle-Grossman, [Mercy Corps](#)
- » Phil Oldham, [Mercy Corps](#)

Social enterprise is hard enough when you're working in a stable economy and political system. But what if you don't have even that? See what it took to bring back the cacao industry in Liberia after the civil war, and how relief and development money came together with debt and equity financing to make it happen.

## BREAKOUT: ROOM 370C

### 12:05pm | Panel | NEW SPIN ON OLD WORLD DEVELOPMENT

- » Moderator: Charly Kleissner, [KL Felicitas Foundation](#)
- » Noah Beckwith, [Aureos](#)
- » Vineet Rai, [Avishkar](#)
- » Arun Gore, [Grey Matters Capital](#)
- » Jill Chen, [Capital Markets](#), [Grameen Foundation](#)

Experienced international development private equity funds come together with new innovative funds to talk about what they've learned and what's working now.

### 2:30pm | Panel | NEW AFRICAN CAPITAL

- » Moderator: Kojo Paris, [Social Private Equity](#), [South Africa](#)
- » Jo-ann Pohl, [Teba Bank](#)
- » Modibo Khane Camara, [FASO Investments](#)
- » Samuel Alemayehu, [Venrock Associates](#)

Social investment isn't just for advanced economies. Social venture funds and angel investors started in Africa by Africans discuss their experiences, successes and challenges.

### 3:35pm | Panel | SUCCESSFUL IT INITIATIVES

- » Moderator: Gary Bolles, [Xigi Media](#)
- » Wilton Agatstein, [UC Davis](#)
- » Dan Shine, [AMD 50x15](#)
- » Brooke Partridge, [Vitalwave Consulting](#)
- » Matthew Clark, [Microsoft](#)

A roundup of the best of what's working in partnering for successful IT initiatives in the developing world, key trends, and unmet needs.

## BREAKOUT: ROOM 230C

### 11:00am | Case Study | SOCIALMARKETS.ORG

- » Jeff Tuller, [Socialmarkets](#)
- » Allan Benamer, [Socialmarkets](#)

SocialMarkets.org raises the visibility and liquidity of the enormous social capital being created all around us by providing a web-based market for non-profits, social entrepreneurs and those who invest in them. Using both the objectivity of performance data and the subjectivity of crowd sourcing, SocialMarkets.org helps direct monetary currency to where it can create the most social currency.

### 2:30pm | Panel | INVESTING IN SUSTAINABLE SOCIAL ENTERPRISES

- » Moderator: Arjan Schütte, [The Center for Financial Service Innovation](#)
- » Eric Weaver, [The Opportunity Fund](#)
- » Steve Zuckerman, [Selfhelp.org](#)
- » Tricia McKay, [Medina Foundation](#)

Join this panel to discover some very interesting investment opportunities – across a broad range of the risk/return/social return spectrum – and the powerful impact they can have in leveling the playing field for disadvantaged families and communities. Low income people deserve good business solutions and financial products, in addition to needed social services.

### 3:35pm | Panel | ASPEN NETWORK FOR DEVELOPMENT ENTREPRENEURS

- » Moderator: Andrew Stern, [Dalberg-Global Development Advisors](#)
- » Brad Presner, [Acumen Fund](#)
- » Steve Wright, [Salesforce.com Foundation](#)
- » Ben Powell, [Agora Partners](#)

Learn about a platform to bring developing world funds together to

agree on definitions, build infrastructure, share costs and set standards. The people pulling it together discuss what is happening and why it's needed.

## BREAKOUT: ROOM 235

### 11:00am | Panel | NEW KIND OF CAPITAL FOR NEW KIND OF COMPANY

- » Joy Anderson, [Good Capital](#)
- » Wes Selke, [Good Capital](#)
- » Xavier Hegelson, [Better World Books](#)
- » Greg Steltenpole, [Adina](#)

As the current generation of successful social enterprises moves beyond the startup phase and starts to plan for future growth, it needs a new kind of capital designed to scale both social impact and financial value. Come find out what Good Capital, a social investment firm created by and for social entrepreneurs, and its portfolio companies have learned about how investors can most effectively put their money to work for good.

### 12:05pm | Panel | SUSTAINABLE ENERGY INVESTMENTS FOR THE BASE OF THE PYRAMID

- » Moderator: Mark Beam, [xigi.net](#)
- » Ron Puryear, [Halloran](#)
- » Kurt Hoffman, [Former Director of Shell Foundation](#)
- » Niki Armacost, [Arc Finance](#)
- » Christine Eibs-Singer, [E&Co.](#)

According to some estimates, 1.5 billion people around the world have no access to electricity, two thirds of whom live in India and Sub-Saharan Africa. A panel of international experts explore the

# DAY TWO \* TUESDAY \* OCTOBER 14 {CONTINUED}

trends, opportunities and challenges for providing sustainable energy investments to those at the base of the pyramid.

## 2:30pm | Panel | INNOVATIVE WAYS TO INVEST, BRAZIL TO KENYA

- » Moderator: John Duffy, [GoodWell](#)
- » Linda Jenkinson, [WOW Investments](#)
- » Marsha Wulff, [Africeuticals](#)
- » Leonardo Letelier, [sitawi](#)

Social capital being deployed in cutting edge ways by startup funds in Africa and South America.

## 3:35pm | Panel | SCALING U.S. SOCIAL ENTERPRISE

- » Moderator: Jonathan Harrison, [Rubicon Nat'l Social Innovations](#)
- » Marc Spencer, [Juma Ventures](#)
- » Lee Zimmerman, [Evergreen Lodge](#)

For social enterprises to have a significant impact on poverty and wealth generation in the U.S. they must reach a much greater scale than we've seen before from the movement. This session will explore three distinct models that redefine our understanding of social enterprise. Panelists will share learnings from their current pursuits of innovative scalable models that balance social impact with financial sustainability.

economic strength in developing countries. However, deploying social capital in rural areas remains a challenge to those who want to invest in the rural poor. This session will discuss models for deploying capital and other resources in rural areas.

## 12:05pm | Panel | SME'S IN WEST AFRICA -- THE NEW FRONTIER

- » Linda Jenkinson, [WOW Investments](#)

You have heard about micro-finance: the next frontier is macro-finance, investing in SME's. WOW is in its third year working in West Africa developing a model to support and grow SME's. Come and hear about the WOW model and share your perspectives in an interactive working session.

## 2:30pm | Panel | A CONVENIENT TRUTH

- » Robert Hanna, [Social Wealth Partners](#)
- » Chris McCormick, [GeoOptics](#)

Meet social wealth investors blending impacts with returns to improve global participation in climate change science and innovations. Learn how social capitalists can accelerate global climate forecasting accuracy to save lives and strengthen ethical development policies around the world.

## 3:35pm | PRO BONO NET NETWORKING SALON

- » Adam Licht, [Pro Bono Net](#)
- » Liz Keith, [Pro Bono Net](#)

Take a break with Pro Bono Net. Enjoy our refreshments, learn about what pro bono resources are available and network with Adam, Liz as well as your fellow investors and entrepreneurs. We will also provide a brief update on the exciting and innovative work Pro Bono Net is doing to more closely link law firms and legal aid organizations to maximize the impact of pro bono lawyers.

## BREAKOUT: ROOM 355C

### 11:00am | Panel | LIVINGCITIES.ORG

- » Robin Hacke, [Living Cities](#)

Living Cities believes that in order to address the challenges of revitalizing America's cities, capital from many types of investors will need to be pooled and deployed in new ways. As a collaboration among foundations and financial institutions, Living Cities has a 17-year track record of bringing together philanthropic, government and private sector resources to invest in improving education, enhancing neighborhoods, supporting health and wellness and supporting wealth-building efforts for low income urban communities. This session will focus on how social investors can put their dollars to work through new vehicles being created at the local and national level.

### 12:05pm | SOCIAL INVESTING IN INDEPENDENT NEWS

- » Harlan Mandel, [Media Development Loan Fund](#)
- » Patrice Schneider, [Media Development Loan Fund](#)
- » Marc Hand, [Public Radio Capital](#)

Independent sources of news and information are vital for any functioning democracy. But how can independent media obtain the investment capital needed to survive and prosper in increasingly competitive environments? What are the unique strengths, from a mission and return perspective, that come from media infrastructure investments? Two organizations, Media Development Loan Fund and Public Radio Capital, describe why independent media is becoming a vital and successful social investment both in the US and across the globe.

## SPONSORED SESSIONS: ROOM 220C

### 11:00am | Panel | VILLAGE ENTERPRISE FUND

- » Brian Lehnan, [Village Enterprise Fund](#)

The new flow of capital now available to entrepreneurs through microfinance and social investing is showing real promise to bring new

**2:30pm | Case Study | ENTREPRENEUR COMMONS**

» Marc Dangeard, [Entrepreneur Commons](#)

Social Investment: Angels and VCs are not really addressing the financial needs of early stage entrepreneurs, and especially not for social entrepreneurs. From the social investor perspective the Angel and VC model (equity deals) is also not adapted. The Entrepreneur Commons™ is a not-for-profit for and by entrepreneurs dedicated to resolving these issues. The organization provides a platform hosting a social network of entrepreneurs, that promotes mentoring between entrepreneur-members and that manages an investment fund providing seed money through debt.

**3:35pm | VOLUNTEERMATCH.ORG INVESTORS' BRIEFING**

» Greg Baldwin, [Volunteer Match](#)

VolunteerMatch.org is an award-winning online service strengthening communities across the country by making it easier for good people and good causes to connect. The leadership team is currently seeking growth capital to finance a \$400 million expansion of its annual social impact and bridge its path to long-term sustainability. Please join us to learn more about this unique opportunity and explore its connections to your own interests and priorities.



# SOCAP08 SPEAKERS

## L. WILTON AGATSTEIN, JR.

Senior Fellow | Winrock International

Wilton is a board member of Inveneo, a Visiting Professor at UC Davis Graduate School of Management, and a Senior Fellow at Winrock International. His passion, his experience, and his expertise is helping teams bring success to emerging market innovative ideas. He believes in the power of technology to make the world a better place through economic development, education, and allowing people to understand their culture in the context of modernity.

Prior to 2008, Wilton was Vice President at Intel and the head of Intel's Emerging Markets Group. During his 27 years at Intel, he was the visionary of Intel's strategy for emerging market specific platforms and the father of the Intel Powered classmate PC (GMPC).

Outside of Intel, he has coached girls/woman's soccer for 14 winning seasons, is an avid bicycle rider/snow boarder, is an amateur photographer and is always looking for people to join him on an adventure.

## MEGHA AGRAWAL

Team Member | Connection Concierge for SOCAP08

Megha spent this past summer as the lead researcher for assetmap.org's northern Uganda pilot project. In this capacity, she was in charge of developing strategic partnerships with local and international nonprofit organizations, as well as individual digital literacy training for program partners.

In 2007, she worked as a program design consultant with the Global Youth Partnership for Africa in the Namuwongo slum in Kampala Uganda. As a student at Northwestern University, her academic concentrations include Learning and Organizational Change and International Studies. She has been a marketing consultant, developed sports for social change programs, and was a teacher at the Breakthrough Collaborative. Megha is a member of the Connection Concierge team at SOCAP08.

## SUNDEEP AHUJA

Organizer | awareness2action Events

Sundeep is an active advisor to cause-oriented platforms, including Kiva, Change.org, Involver, and World of Good by eBay, as well as the organizer of "awareness2action" events which bring together organizations leveraging the web to effect scalable social change.

Previously, he served as Kiva's Marketing Director, a role he filled from March of 2006 to June of 2007. Sundeep is currently co-founder of richrelevance, the exclusive provider of next generation personalized recommendations for e-commerce sites.

He has product management experience from MySpace and eBay, finance experience from JPMorgan H&Q, and acting experience on several television shows. Sundeep holds a BS in Computer Science from Stanford University.

## SAMUEL ALEMAYEHU

Investor | Venrock Ventures

Samuel came to the U.S. in the year 2000, following his father who had been a political refugee in America. At a young age Sam experienced life's extreme hardships first hand in his native Ethiopia.

Eight years later Sam had earned his undergraduate and master's degree in Engineering from Stanford University; created three successful venture backed companies; and currently works at a top VC firm in the Silicon Valley. Immigrating to the U.S. without speaking a single word of English, Sam was a testament to the power of education.

As an Investor at Venrock Ventures in Silicon Valley, he is focusing in digital media, consumer Internet, and mobile. Sam is actively involved as an advisor to numerous tech start-ups in East Africa.

## LAURI ALPERN

Partner | ROI Ventures

Lauri is a partner in ROI Ventures, LLC. ROI Ventures is a strategy firm and development lab that works on projects with both market opportunity and the potential for social impact. Lauri brings to ROI extensive leadership experience in results-oriented institutions and nonprofit organizations.

She is recognized as a national expert in the development of actionable strategies to expand an organization's social mission through sustainable earned-income strategies and social purpose business ventures. Her crystal-clear thinking has made her an invaluable resource and a sought-after mentor for executives and senior level professionals.

Lauri has more than twenty years of experience creating, developing and implementing community, economic development and higher education programs and partnerships.

She has a Master of Urban Planning and Policy degree from the University of Illinois at Chicago. Lauri lives in Chicago with her two sons, Noah and Ethan, husband Richard Feingold and dog, Kitzi.

## JOY ANDERSON

President | Criterion Ventures

A partner at Good Capital, Joy founded and serves as President of Criterion Ventures, a national firm that incubates and scales ventures that make a better world. She evolved the firm from a general contract-consulting group that did a range of strategic work with nonprofits, to a firm that invests time and talent in a few focused social ventures.

Client examples include a system-wide healthcare initiative for the \$14 billion Methodist Pension Fund, to a data sharing system for the Women's Funding Network to track the impact of social change philanthropy through 105 foundations. Criterion has worked in many sectors, including education, poverty alleviation, and healthcare.

# SOCAPO8 SPEAKERS {CONTINUED}

## NICOLA ARMACOST

**Managing Director and Co-founder | Arc Finance, Ltd.**

Niki is Managing Director and Co-founder of Arc, which was formed in the spring of 2008 to link the fields of microfinance and energy. Niki brings over 15 years experience in microfinance to her new position.

From 1993 to 2008, she worked at Women's World Banking, a global microfinance network. At WWB, she served as the Director of Linkages and Learning. Niki was an early advocate of linking energy and microfinance services and was an advisor to the SES/USAID/SEEP Energy and Microfinance Research Initiative from 2004 to 2007.

Currently, she serves as an advisor to Parwaz, a Afghan women-led microfinance organization and to Distributed Capital, and is on the Board of Global Exchange. She has a BA in international relations (University of Toronto, Canada), an LLB (Queen's University, Canada) and an LLM (Osgoode Hall Law School, Canada).

## MINDY ARONOFF

**Director of Training & Resources | Bay Area Video Coalition**

Mindy has spent the last ten years at Bay Area Video Coalition (BAVC), the nation's largest media arts center, helping to develop such diverse programming as video preservation, postproduction services for independent producers, executive producing videos for nonprofit organizations, co-producing 5 seasons of Spark, which airs on KQED, and most recently, heading up the adult training programs.

In her role as Director of Training & Resources, Mindy works closely with digital media professionals, government agencies and industry leaders to offer the most relevant media training available.

Mindy came to BAVC with 17 years in retail arts management. She has a B.A. in Design from UCLA and a Multimedia Certificate from SFSU Extended Learning.

## RICK AUBRY, PH.D.

**President | Rubicon Programs Inc.**

Rick is the President of Rubicon Programs Inc., one of America's pre-eminent nonprofit organizations that has had a significant, and measured impact on the lives of over 40,000 people; confronting homelessness, poverty, and the challenges of living with mental health disabilities. Rubicon is a five-time winner of the Fast Company Magazine Social Capitalist Award for its impact and innovation in addressing these issues.

Rick is a faculty member and Lecturer in Management at the Stanford Graduate School of Business, where he is also a fellow of Stanford's Center for Social Innovation. He is one of the co-authors of Generating and Sustaining Nonprofit Earned Income, and numerous case studies on social entrepreneurs. Rick is a regular presenter at the World Economic Forum Annual meeting in Davos.

Rick earned his BA from Syracuse University, MA in Psychology from West Georgia University, and Ph.D. in Psychology from The Wright Institute. He is also a graduate of the Stanford Graduate School of Business Program for Nonprofit Leaders. He lives with his wife and two sons in the San Francisco Bay Area.

## GREG BALDWIN

**President & Board of Director | VolunteerMatch**

Greg joined VolunteerMatch in 1998 as its Chief Imagination Officer to help finish hotwiring the Internet to help everyone find a great place to volunteer. He has served on the Executive Team since 1998. Greg managed the launch of the first VolunteerMatch site and has been responsible for shaping the organization's brand identity, core product strategy, and marketing and communications.

He began his career at the Leo Burnett advertising agency and co-founded 2d Interactive, Inc. -- a Boston-based technology start-up incubated at Harvard Business School.

Greg received his A.B. in Public Policy from Brown University. He has served as a volunteer with many organizations including Big Brothers, Junior Achievement, Artists for Humanity, Boston's Museum of Science and his alma mater. He is a life-long volunteer and regularly speaks at nonprofit events and conferences on the subjects of volunteering, communication, and the Internet.

## KEN BANKS

**Founder | kiwanja.net**

Founder of kiwanja.net, Ken specializes in the application of mobile technology for positive social and environmental change in the developing world. He combines over 22 years in I.T. with over 15 years experience living and working throughout Africa. His vision is to empower others to create social change, and he does this by developing and providing tools to mostly grassroots organizations that seek to better use technology in their work.

Recently, his research resulted in the development of FrontlineSMS, a field communication system designed to empower grassroots nonprofit organizations. In 2007 he hit headline news on the BBC when FrontlineSMS was used to help monitor the Nigerian Presidential elections.

Ken graduated from Sussex University with honors in Social Anthropology with Development Studies and currently divides his time between Cambridge (UK) and Stanford University in California on a MacArthur Foundation-funded Fellowship.

## CATE BATSON BARIL

**Director of Business Development | TransFair USA**

Cate is currently the Director of Business Development at TransFair USA -- the US certifier for Fair Trade products. In this role, she works with dynamic companies that are changing the way the world does business -- partnering with developing world producers.

Cate spent 10 years at Green Mountain Coffee Roasters developing & nurturing their Fair Trade and organic product lines, and the Newman's Own Organic Fair Trade coffee program. This background hopefully means she has had the opportunity to creatively mess up in every possible retail channel, saving her new partners with her vast experience of mistakes!

**CAROLINE BARLERIN**

**Consultant | Good Capital**

Caroline has a passion for bringing financial and human capital into the public benefit sector. Her management and leadership experience bridges the worlds of profit and purpose. Most recently as the Packard Foundation Sloan Fellow at Stanford Business School, Caroline researched future trends in global poverty with Grameen Foundation and traveled to Myanmar where she collaborated with IDE to design a new bicycle-powered rice thresher for small acre farmers.

Prior to Stanford, Caroline was Managing Director at Level Playing Field Institute, a nonprofit committed to promoting access to higher education and fairness in the workplace. Earlier in her career, Caroline consulted global Fortune 500 companies on business and brand strategy as a Client Director at Landor Associates. Caroline co-founded Taproot Foundation whose mission is to strengthen nonprofits by engaging business professionals in service. Caroline lives in San Francisco with her husband.

**KARYN BARSA**

**President | Investors' Circle**

Karyn serves as President for Investors' Circle. Formerly CEO of Smith & Hawken and COO/CFO of Patagonia, she has led two vibrant organizations that serve as models for values-centered leadership around the world.

With a career that includes investment banking, commercial banking, and turnaround corporate finance, Karyn has specialized in opportunities

to meld business and social missions and has been a featured speaker for numerous organizations including the American Management Association, Business for Social Responsibility, and various sponsored conferences.

In addition to serving on the board of Investors' Circle, Karyn is a member of the Board of Directors at Deckers Outdoor Corporation and a member of the Board of Directors of NESsT. Karyn also serves on the Advisory Board of inResonance, Inc. She holds a B.A. in Economics from Connecticut College and a MBA from the University of Southern California.

**DOUG BAUER**

**Senior Vice President | Rockefeller Philanthropy Advisors**

Doug was formerly a Vice President at Goldman Sachs and President of the Goldman Sachs Philanthropy Fund, the firm's donor-advised fund. Doug was formerly Director of Community Partnership at SmithKline Beecham (now GlaxoSmithKline) and Executive Director of the SmithKline Beecham Foundation, where he focused on community-based healthcare in both the developed and developing world.

Previously, Doug was a Program Officer for Culture at the Pew Charitable Trusts where he created and managed two results-oriented, multi-year operating support programs for arts organizations. He serves on boards or committees for the Council on Foundations, The Better Business Bureau Wise Giving Alliance and the Communications Network in Philanthropy. He is also an adjunct faculty member at the University of Pennsylvania where he teaches a course and seminars on philanthropy.

**MARK BEAM**

**Co-founder | Xigi Media**

Mark was born in Omaha and lives in Oaxaca. In between he has lived and worked in Chicago, Los Angeles, New York and San Francisco as a senior manager on Wall Street, later as a social media entrepreneur

and now as a "social architect." To Mark that title means convening, mapping the questions and defining the context, initiating new conversations and connections, and creating the space for people to act on what matters.

He is the co-founder of Xigi.net and Xigi Media, the organization that produces the Social Capital Markets conference, as well as the co-founder of Piedra, a cooperative network that seeks to support the well-being of the people of Oaxaca, Mexico. He founded artbeam, an art studio that works closely with international media artists. And he serves as advisor to Halloran Philanthropies.

His true passions are raising two boys, Weston & Sky, and being here now.

**JOSH BECKER**

**Co-founder and General Partner | New Cycle Capital**

Josh is the co-founder and General Partner of New Cycle Capital, a venture capital firm focused on investing in businesses that promote The Sustainable Economy.

Josh is an Advisor to Energy Unlimited, a pioneering wind energy company. He is co-founder of the Freedom Prize Foundation, which will soon be giving out \$5M in prizes with DOE to encourage deployment of clean energy technologies. He is also co-founder of SmartTransportation.org.

Josh is the founder and Chair of Full Circle Fund. He serves on the National Board of Directors for One Economy and serves on the Board of Trustees for the newest campus in the University of California System, The University of California at Merced. Josh was recently named as one of the Top 40 under 40 people to watch in Silicon Valley by the San Jose Business Journal. He also was selected to be part of the SV100, a group of the 100 Most Influential People in Silicon Valley.

# SOCAPO8 SPEAKERS {CONTINUED}

## MARK BECKFORD

### Emerging Markets Aficionado

Mark is a global technology executive with a passion for building high-growth businesses using the principles of “creative capitalism” to create profits and progress in untapped markets and underserved populations.

In 11 years at Intel he led diverse global teams to extend Intel’s emerging market leadership, delivering millions of dollars in new revenue. Mark has lived and worked in China, grown markets in 40 countries, served as Intel’s channels/emerging-markets spokesperson, and presented at global leadership gatherings, including the World Economic Forum and the World Congress of IT on the role technology can play in accelerating economic development.

He received his Masters of Business Administration from the Haas School of Business at UC Berkeley and is a mentor and advisor to startups at Haas and UC Davis Graduate School of Management. Mark blogs about game-changing strategies that create high-growth business in emerging markets at <http://www.disruptiveleadership.com>.

## NOAH BECKWITH

### Partner | Aureos Advisers Limited

Noah is responsible for fund raising business principles, development impact assessment and investor relations at Aureos Advisers Limited. He also plays a critical role in developing new markets and products for the Aureos Group.

Prior to joining AAL, he worked for Chemonics UK Ltd, specialising in enterprise development, business development services and country analysis, focusing on Africa, Latin America and the Caribbean. Previously, he spent two years with CDC Group plc and four years with the Economist Group as a Senior Economist for the Africa and Pacific regions of the Economist Intelligence Unit and was a regular contributor to the Economist newspaper.

Noah graduated from Oxford University with an MA in Spanish and English, and from the London School of Economics with a Diploma in International Relations and an MSc in Development Economics. He is bilingual in English and Spanish, and speaks fluent French, Portuguese and Italian.

## ALLAN BENAMER

### Executive Director and Co-founder | [socialmarkets.org](http://socialmarkets.org)

Allan is Executive Director and co-founder of [socialmarkets.org](http://socialmarkets.org), a nonprofit organization dedicated to raising the visibility and liquidity of the enormous social capital being created all around us.

He has extensive experience working as a web developer in the for-profit and nonprofit sectors. He’s old enough to remember carrying the Webmaster title for the California Administrative Office of the Courts and was also webmaster for the McGraw-Hill Companies.

Before co-founding [socialmarkets.org](http://socialmarkets.org), Allan spent five years as IT Director for New York’s Coalition for the Homeless. He is also the blogger behind [www.nonprofittechblog.org](http://www.nonprofittechblog.org).

## SHARI BERENBACH

### President and CEO | Calvert Social Investment Foundation

As President and CEO of the Calvert Social Investment Foundation (Calvert Foundation), Shari has distinguished herself as a leader in the emerging Community Investment industry, where she presently manages over \$200 million in community investment assets raised from over 2000 private investors. Shari brings more than 20 years experience, spanning micro-credit and innovative approaches to finance.

Prior to joining the Calvert Foundation, she worked for the International Finance Corporation and held private sector positions at Citibank and Salomon Brothers. She was one of the pioneers in the micro-credit field, working in more than a dozen countries around the globe.

Shari currently serves on the Board of the Neighborhood Funders Group and Community Wealth Ventures and remains active in the Social Investment Forum. She is the author of numerous articles related to international micro-finance and community investment. She holds an MBA in Finance from Columbia Business School and an MA in Latin American Studies from UCLA.

## ELLIOT BERGER

### Director of Strategic Philanthropy | Merrill Lynch

Elliot joined Merrill Lynch in 1999 as the philanthropic specialist for Family Office Services. For the last three years, Elliot served as Director of Strategic Philanthropy, overseeing services for 3,000 foundations. His experience includes twelve years in the nonprofit sector, including Director of Development at New York University.

Elliot recently became an advisor for the Private Banking and Investment Group. He continues to consult with nonprofits and ultra-high-net-worth families on how to maximize the impact of charitable endeavors and how asset management is different for philanthropic resources. He provides advice on best practices with values based investing, foundation governance and management issues, next generation preparation, and venture philanthropy.

His volunteer involvement includes leadership positions with the Global Fund to fight AIDS, TB, and Malaria, UJF of Princeton, and NJ Explorers of Boy Scouts. He earned his B.A. and M.B.A. from Rutgers University.

## DEBRA BERMAN

### Director of Talent and Search | JustMeans

Deb is the Director of Talent and Search at JustMeans. JustMeans is a social media company that provides companies with a platform for communicating about social responsibility. Deb focuses on assisting JustMeans’ clients to find the talent they need to achieve their goals by helping them to build capacity through highly individualized search services.

Before joining JustMeans, Deb was consulting to organizations around capacity building and recruiting with a particular focus on developing and achieving aggressive and strategic growth plans. Deb has extensive background in the nonprofit field including founding a highly successful program for children with special needs called Camp Starfish. She remains an active board member.

In addition to her experience conducting technology market research for Fortune 500 companies at Forrester Research, Deb previously worked with children as a psycho-educational counselor at Judge Bakers Children's Center, and as a counselor and supervisor at Ramapo for Children in Rhinebeck, New York.

#### LUCY BERNHOLZ

##### Founder and President | [Blueprint Research & Design](#)

Lucy is the Founder and President of Blueprint Research & Design, Inc. a strategy consulting firm that helps philanthropic individuals and institutions achieve their missions.

Lucy is also the publisher of Philanthropy2173, an award winning blog about the business of giving, and she serves as Executive Producer of The Giving Channel on Fora.tv.

She is a noted analyst of the philanthropic industry and has published articles in the trade and general press, edited collections, and scholarly journals. Her most recent book, *Creating Philanthropic Capital Markets: The Deliberate Evolution*, was published in 2004. Lucy has a B.A. from Yale University and a M.A. and Ph.D. from Stanford University.

#### MATTHEW BISHOP

[American Business Editor and New York Bureau Chief | The Economist](#)  
**Philanthrocapitalism: How the Rich Can Save the World**, Matthew's new book (with Michael Green) on the global boom now under way in philanthropy, has just been published. He is also the author of *Essential Economics*, the official Economist layperson's guide to economics.

Before joining The Economist, Matthew was on the faculty of London Business School, where he co-authored three books for Oxford University Press. He has served as a member of the Sykes Commission on the investment system in the 21st Century.

He was also on the Advisors Group of the United Nations International Year of Microcredit 2005. The World Economic Forum has honored him as a Young Global Leader. He is a graduate of Oxford University.

#### BEN BLACK

##### General Partner & Co-founder | [New Cycle Capital](#)

Ben is the co-founder and General Partner of New Cycle Capital, a venture capital firm focused on investing in businesses that promote The Sustainable Economy.

Ben was previously on the investment teams at Maveron, a consumer-focused venture capital firm founded by Howard Schultz, the Chairman of Starbucks, and at Rosewood Capital, a consumer-focused private equity firm. He has been integral to investments that include two Inc. 500 award winners, Allconnect and iFloor.com, and also to Internet REIT, OnRequest Images, Citizenhawk and The Villa.

As an entrepreneur, Ben was VP of Corporate Development for a team that transformed Harris Interactive into the leading internet-based market research firm, culminating into a successful IPO and now generates more than \$250M in revenue.

#### GARY A. BOLLES

##### CEO | [Xigi Software](#)

Gary is CEO of Xigi Software (ZIG-ee), which produces Web-based tools designed to help teams and groups understand and solve complex problems through coordinated insight management.

Gary also manages Xigi Media, a startup event production and consulting company producing the inaugural SOCAP conference.

Current Xigi Media clients include Google, the Interactive Advertising Bureau, London Business School, and UNGAID, a technology initiative of the United Nations.

Through CollectiveIntelligence.net, he and several partners have performed pro bono consulting work focused on mapping and defining complex social and global problems. Gary has also advised organizations such as Silicon Valley Bank, Nokia, Intel, the Dalai Lama Foundation, and is currently an advisor to Good Capital, a venture fund for socially-focused, expansion-stage, for-profit businesses.

Previously, he was the editorial director of publications such as Interactive Week, Yahoo! Internet Life, and Network Computing, as well as the on-screen host of TechTV's "Working the Web".

#### KEVIN BRAITHEWAITE

##### Director | [RootSpace](#)

Kevin is an entrepreneur with a particular interest in ventures that tackle key global challenges such as climate change, environmental destruction, poverty and disease.

Kevin has founded and built a number of companies, encompassing both service- and product-based ventures in multiple technology sectors. He has been a valued advisor to early stage technology investors, startups, corporations and universities. For a number of years, he worked with the venture incubator at the University of Cambridge, where he mentored, trained and supported a wide range of young entrepreneurs.

He currently sits on the advisory boards of GreenMango, a mobile platform empowering low-income entrepreneurs in India, and Aptivate, a nonprofit providing IT services for international development. He has been a mentor or judge for many leading business plan competitions, including the Global Social Venture Competition (GSVC), the California Clean Tech Open and annual venture competitions at Oxford, Cambridge and Stanford universities.

# SOCAPO8 SPEAKERS {CONTINUED}

## TIM BROWN

President and CEO | IDEO

Tim speaks regularly on the value of design thinking and innovation. His leadership in design is widely sought in industry, academia, and the nonprofit community. He participates in the World Economic Forum at Davos, and advises senior executives of Fortune 500 companies on a variety of boards and committees.

Most recently, he joined the Advisory Council of Acumen Fund, a not-for-profit global venture fund. He has led strategic client relationships with such companies as Procter & Gamble, DaimlerChrysler, Microsoft, Motorola, Pepsi, and Steelcase.

In 1987, after earning his MA in design from the Royal College of Art in London, Tim joined IDEO, a world leader in design and innovation. He managed IDEO's San Francisco office from 1990 to 1995, and headed IDEO Europe from 1995 to 2000.

## BOB CABEZA

Executive Director | YMCA of Greater Long Beach

Bob has twenty-six years experience in youth development programming and community development, resulting in the ability to lead unique collaboratives designed to better the lives of youth and families. He has a special focus on youth development and technology equity for underserved communities.

Prior to becoming Executive Director with the YMCA, he was the YMCA Youth Institute Director, Associate Executive Director of the Ketchum Downtown YMCA in Los Angeles, Youth Services Director for the YMCA of Greater Long Beach, and Director of Recreation Services for The Foundation for the Junior Blind.

He is a fellow of the Community Technology Foundation of California's Z-Fellow Program and has been a panelist and presenter at several national conferences. Bob is the first non-school-based educator to be

named an Apple Distinguished Educator. He holds a Bachelor of Arts in Journalism from San Jose State University. He has been married for 12 years and has an 8-year-old son.

## LAURA CALLANAN

Social Sector Office | McKinsey & Co.

Laura works in the Philanthropy Practice with foundations and nonprofits in the Social Sector Office of McKinsey & Co.

She is the former Deputy to the Chief Investment Officer of the Rockefeller Foundation, former Executive Director of the Prospect Hill Foundation and a former Senior Advisor of the United Nations Development Programme.

## MODIBO K. CAMARA, PhD

Founder | FASO Investments

Modibo is the founder of FASO Investments, which was formed to invest equity capital in African financial institutions. Two highly respected European institutional investors are lead investors in the fund.

FASO Investments seeks a reasonable financial return while contributing to the ability for individuals and entrepreneurs to access finance in a region where this has been a significant barrier to enhancing quality of life.

Modibo is also the founder, President & CEO of A2F Consulting, a firm that specializes in access to finance issues in developing countries. He provides advice on financial sector policy to senior officials, strategic advice to Micro Finance and other financial institutions around the world. He has hands-on experience in microfinance and SME finance in Africa, Asia and Latin America.

Prior to founding A2F and FASO Investments, Modibo worked for the IFC, The World Bank, CGAP, Gemini Consulting, and IPC GmbH. He holds a PhD in Financial Economics. Modibo is a native of Mali.

## MARK CAMPANALE

Founder | The Social Stock Exchange

Mark has nineteen years experience in sustainable financial markets and his areas of interest are in the finance of social enterprises, clean tech companies, sustainable asset management and ecosystems services, principally forests.

Mark is co-founder of sustainable investment businesses firstly at Jupiter Asset Management with the Ecology Funds (1989-1994); NPI with Global Care Funds (1994-1999); AMP Capital with the Sustainable Future Funds (2000-2001) and Henderson Global Investors with the Industries of the Future Fund (1999-2006). He is a Founder Director of the UK Social Investment Forum (1990-present), the Rainforest Foundation (UK) and is founder of The Social Stock Exchange (UK).

Mark chaired the study "Developing a Social Equity Capital Market" which was funded by the Charities Aid Foundation (CAF) and researched by The New Economics Foundation in 2006. He is a visiting speaker on the theme of social capital markets, at the Skoll World Forum on Social Entrepreneurship at the Said Business School, Oxford.

## TONY CARR

Executive Director | Halloran Philanthropies

In his former life, Tony had a successful career in healthcare as a Hospital CEO and entrepreneur. He has developed several joint ventures with health organizations and physicians involving strategic planning, business development and marketing. He served as the CEO of the first surgical hospital in the Nation and CEO of the first community-owned Heart Hospital in California.

He has received numerous honors and awards for quality and service excellence, entrepreneurship and innovation and was awarded the "Innovator of the Year" by the American Hospital Association. He was the first hospital executive to receive the Eureka Award, the California version of the Malcolm Baldrige Quality Award. Tony has made

numerous presentations around the world and has been published in several healthcare journals.

In 2007 Tony joined his life long friend Harry Halloran as Executive Director of Halloran Philanthropies and spearheads its activities. Tony brings a spirited passion to his endeavors that combine respect for the individual and a deep understanding of the power of collaboration and teamwork.

#### **RAJNI CHANDRASEKHAR**

##### **Team Member | Connection Concierge for SOCAPO8**

Rajni is a senior undergraduate at Northwestern University, studying Political Science and International Studies, and studied at the London School of Economics in 2007-2008. She is the Co-Director of the Global Engagement Summit at Northwestern University, a week long training program that helps student social entrepreneurs from around the world develop the skills and resources they need to put their ideas into practice.

Rajni has worked with education-focused development non-profits in Bangalore, India and London, United Kingdom. She spent the previous summer working on agriculture development issues with the Chicago Council on Global Affairs. Rajni hopes to study International Development in the UK in the future. Rajni is a member of the Connection Concierge team at Social Capital Markets 2008.

#### **ROBERT CHATWANI**

##### **General Manager | WorldofGood.com, eBay, Inc.**

As General Manager of WorldofGood.com, Robert oversees strategic planning, operations, marketing and business development for eBay's newest community focused on socially responsible shopping. WorldofGood.com is dedicated to providing a trusted platform where individuals can create positive change through commerce, as part of a global community.

Formerly a Senior Manager on eBay's Internet Marketing team, Robert spearheaded the company's search optimization relationships with Google, Yahoo!, and Microsoft. Robert joined eBay in 2003 as Manager of Platform Strategy, where he helped to transform eBay into the world's largest Web services platform.

Prior to eBay, Robert was the co-founder and COO of MonkeyBin, the leading software company to the global barter & corporate trading industry. Before MonkeyBin, Robert worked in management consulting at McKinsey & Company, where he served Fortune 500 companies and helped start McKinsey's Globalization Practice.

Robert received a Bachelor of Economics from DePaul University, completed graduate work at the University of Chicago, and is completing an MBA from UC Berkeley's Haas School of Business.

#### **DAVE CHEN**

##### **Founder | Equilibrium Capital**

Dave's focus on sustainability is a result of his work in the Portland, Oregon's regional economic development policy, in regional energy policy, and as a venture capital investor.

In 2007, he collaborated on the development of a framework for market-based mission investing which is now a core component of the 2% Challenge program. In August 2007, he formed Equilibrium Capital Group, an investment firm committed to building the leading companies for a sustainable future. Most recently Dave was a general partner at OVP Venture Partners, joining the firm in 2001.

Prior to OVP, Dave founded GeoTrust & The Ascent Group, was Vice President of Marketing for Mentor Graphics, was an associate at McKinsey & Co, and was an early team member in 1978 at Solectron.

Dave is co-owner of Patton Valley Vineyards, committed to making the

finest Oregon Pinot Noir based on sustainable vineyard practices. Dave received his BA in Biology from the University of California, Berkeley and his MBA from the Kellogg School of Management at Northwestern University.

#### **JILL CHEN**

##### **Senior Program Advisor | Grameen Foundation**

Jill joined Grameen Foundation in January 2007 and brings over 17 years of experience in finance and banking. Previously, she was Director/Group Vice President in ABN Amro's Cross Border Structured Finance and Project Finance in Chicago and Hong Kong, where she originated and structured financings for emerging markets projects in transportation, oil & gas, telecom, tourism and power.

Jill also worked as Investment Officer with the International Finance Corporation's Asia Department in Washington, DC and Beijing in project financing and direct investments. Before IFC, she was Manager with Pepsico World Trade in countertrade/barter and Senior Consultant with Deloitte & Touche in mergers and acquisitions. Jill speaks Mandarin Chinese and holds a MBA in finance from the Wharton School and a BA in Political Science and Comparative Area Studies from Duke University.

#### **MATTHEW CLARK**

##### **Senior Director | Microsoft**

Matthew is Senior Director of Emerging Markets and Local Software Economy for Microsoft's Emerging Business Team (EBT). He is responsible for creating and delivering Microsoft business enablement programs that accelerate the growth of the most promising startups in emerging markets and build a supporting community of incubators, seed and venture capital around them.

Matthew has over 12 years of experience driving business strategy and building private-public partnerships in the developing world. Prior to joining EBT in July 2008, Matthew oversaw Microsoft's worldwide

# SOCAPO8 SPEAKERS {CONTINUED}

relationships with international financial institutions like the World Bank, directing Microsoft's marketing and engagement on commercial opportunities, corporate social responsibility programs and policy.

He has a B.A. in Political Science from the University of Toronto and M.A. in Political Science from McMaster University.

## REGINA CONNELL

### Founder | Saltcellar Group

Regina is the founder of Saltcellar Group, a brand and experience innovation consultancy working with corporations, nonprofits, and social enterprises. In addition, she is on the Advisory Board of GoodCap.

Prior to founding Saltcellar, Regina held senior roles at Proxicom, an e-business services company; Landor Associates, a brand design agency; Deloitte & Touche, and Booz Allen & Hamilton. Prior to joining the consulting profession, she held management roles at Apple and at Intel. Regina received her JD from UC Hastings and her BA in International Relations from Stanford University. Regina is currently based in San Francisco.

## DANIEL CRISAFULLI

### Director, Ecosystem Investments and Partnerships | Skoll Foundation

Dan joined the Skoll Foundation as a Senior Program Officer in February 2007, where he leads the practice aimed at 'building the field' of social entrepreneurship through grant and program-related investments.

Prior to joining Skoll Foundation, Dan co-managed the World Bank's social entrepreneurship and innovation program, the Development Marketplace (DM) beginning in 2004. He brought a venture capital approach to the DM, taking a hands-on role in the success of investees. The DM's model of support for small-scale solutions to social and economic challenges was designated a "best practice" in corporate innovation by Harvard Business Review.

Previously, Dan co-founded the technology venture capital group at the International Finance Corporation (IFC) in 2000, helping to build a \$70 million investment program.

Dan earned a bachelor's degree in government summa cum laude from Dartmouth College and a master's degree in public policy from the Kennedy School at Harvard University, where he was a Kennedy Scholar.

## PETER S. CROSBY

### Founding Partner | AllTogetherNow Consulting

Peter is a social entrepreneur with executive leadership experience in international nonprofit and for-profit environments. He has served as Co-Founder/CEO/Chairman of GirlGeeks.com; Interim CEO of SeniorNet.org; COO of Rockefeller Family's TechRocks.org; CTO at the International Rescue Committee; and Managing Director/Africa of the Anglican Malaria Project. Peter also chaired Social Enterprise Alliance's International Summit in 2004.

Currently, Peter is Managing Partner of AllTogetherNow – a consulting group integrating social enterprises with media & technology – globally. AllTogetherNow's clients include: TechSoup.org, Groundspring.org, James Irvine Foundation, Green World Campaign, Sustainable Global Leadership Alliance, Interra Project, BranchHome, The Hunger Project and TechSMART Group.

Peter has also lived in Japan, China and Swaziland while producing media for National Geographic TV, NHK TV / Radio, Monitor Radio, Los Angeles Times, Asian Wall Street Journal and AsiaWeek. He is a frequent conference speaker, sings in a gospel choir and is now training for the New York marathon.

## CHERYL DAHLE

### Director | Ashoka

Cheryl is director of the Discovery Group practice for Ashoka. As a

journalist, entrepreneur and thought leader, she has spent nearly ten years working at the intersection of business and social innovation.

She founded and led Fast Company's Social Capitalist awards, a competition to surface top social entrepreneurs. As the project manager for four years, she helped design an evaluation methodology and sift through hundreds of nonprofit applications each year to find top performers with compelling models for change.

She has written extensively on capital markets for nonprofits, sustainability, and social entrepreneurs in the U.S. and abroad. As a consultant and advisor, she has served leading organizations in the space of hybrid business/social solutions, including the World Business Council for Sustainable Development, The Skoll Foundation and the Center for the Advancement of Social Entrepreneurship at Duke University.

## MARC DANGEARD

### Founder | Entrepreneur Commons™

Marc is an entrepreneur and network weaver. He is the founder of the Entrepreneur Commons, a not-for-profit organization for and by entrepreneurs dedicated to helping them finance their ventures through a social network that manages a seed investment fund and that fosters mentoring between members.

Marc is also a managing partner at Melcion, Chassagne & Cie, a group of international senior business advisors dedicated to helping entrepreneurs.

Prior to working with Melcion Chassagne, Marc was advising entrepreneurs through the Silicon Valley Technopole, which he co-founded in 2005. Marc also worked for Oracle for 8 years, where he was involved with products such as iStore, iSupport and other software. Prior to this he started and sold a company providing eCommerce software and services in 1995.

**MOLLY DAY****Team Member | Connection Concierge for SOCAPO8**

Molly is the Executive Director and Co-Founder of campusCATALYST, an organization that builds capacity of nonprofits, communities, and the next generation of cross-sectoral leaders by engaging college and business school students in high-impact, pro-bono consulting services in partnership with community-based organizations.

This year, Molly is continuing with campusCATALYST as a Northwestern Public Interest Fellow. Prior to campusCATALYST, Molly studied Social Policy, International Studies, and Spanish at Northwestern University while participating in various on-campus activities including National Student Partnerships and Americans for Informed Democracy. She also interned for Senator Barack Obama and the U.S. Department of State. She is also interested in economic development, having traveled to rural Malawi during her senior year to research integrated microfinance/AIDS education programs. Molly is a member of the Connection Concierge team at Social Capital Markets 2008.

**BETSY DENSMORE****Vice President | Social Enterprise Institute**

Betsy is VP of the Social Enterprise Institute, which focuses on supporting nonprofit social entrepreneurs in building mission-based businesses.

Her past, varied experience lends itself to SEI's activities. She came to California in 2000 to serve as a program manager for a global personal development and leadership training organization. Prior to that, she was the Executive Director of a major legal foundation for ten years.

In the 80's, she supervised a large fee for service social enterprise that reduced energy costs for building owners in low-income Chicago neighborhoods, and served as a manager in the public affairs department of a Fortune 500 retailer. Along the way, she has also helped to found 5 small businesses.

**SASHA DICHTER****Director of Business Development | Acumen Fund**

As Director of Business Development, Sasha is responsible for revenue-generation at Acumen Fund and for creating a healthy, vibrant, and engaged community of Acumen Fund Partners and Advisors. Previously, Sasha was Global Manager of Corporate Citizenship for the consumer finance business at GE Money (formerly of GE Capital), helping expand their financial offerings to underserved communities globally.

Prior to GE, Sasha was Senior Program Manager for Corporate Citizenship at IBM, where he helped craft and execute the company's global corporate social responsibility strategy and led global programs to support leadership training to improve public education.

He has also worked at the microfinance group of Bank Rakyat Indonesia, and in business development for Navic Networks, a venture-backed digital cable startup recently acquired by Microsoft. Sasha holds a BA from Harvard College; a Masters in Public Administration in International Development from the Harvard Kennedy School; and an MBA from Harvard Business School. He speaks Portuguese and Spanish, as well as passable French and Malay-Indonesian.

**JOHN DUFFY****Partner | Goodwell Investments**

John is a social entrepreneur who has been involved in the field of double bottom line investing for the last 10 years. He is a partner in Goodwell Investments, a board member of Social Fusion, and an advisor to several double bottom line business ventures.

Formerly, John was an advisor to Geneva Global, a professional services firm for international philanthropy, as well as the Executive Director of Net Impact, an international network of MBA students committed to social entrepreneurship.

Previously, he worked in two start-up wireless communications

companies, one of which he co-founded. He was an Executive Vice President with Drexel Burnham Lambert and began his investment career with Dean Witter Reynolds. Before his Wall Street career he managed a 60-person task force for Transamerica Computer Corporation on the first computer-based litigation in United States history. John also worked as a Community Organizer with Michigan Legal Services after completing his service with the Peace Corps.

**DEBRA DUNN****Associate Consulting Professor | Stanford d.school**

Debra is currently working as an Advisor to Social Ventures around the world and as an Associate Consulting Professor at the Hasso Plattner Institute of Design (aka d.school) at Stanford University.

Debra left Hewlett Packard in June of 2005 after 22 years. For the last 3 years of her HP career Debra was senior vice president of Corporate Affairs and Global Citizenship. Previously, as vice president of strategy and corporate operations, she led corporate strategy, corporate development, corporate communications and brand management, corporate philanthropy and government affairs.

She holds a bachelor's degree in comparative economics from Brown University in Providence, R.I., and a master's degree in business from Harvard School of Business in Cambridge, MA.

She serves on the Boards of the Skoll Foundation, B Lab, Global Giving, and the Faculty of Sustainability.

**DAVID EDELSTEIN****Director of ICT Innovation | Grameen Technology Center**

As Director of Information and Communication Technology Innovation, David guides efforts to develop, test, strengthen and scale mobile applications that offer the potential to improve lives and livelihoods. David's teams are exploring the potential of specific applications by working with networks of people in developing countries, such as Village

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Phone Operators, who own and provide access to mobile phones.

Prior to joining the Grameen Technology Center, David spent three years at Microsoft designing innovative business models to provide affordable technology products for people in emerging markets. David also worked in Brazil for four years, with the consulting firm McKinsey & Company, where he developed business strategies tailored to the needs of consumers and businesses in emerging economies.

Previously, David conducted economic analyses and evaluated public policy with the White House Council of Economic Advisers and with Resources For the Future. He holds a Bachelors degree in Environmental Science and Economics from Colby College and a Masters degree in Economics and Public Policy from Princeton University.

## LAURA L. EFURD

**Chief Community Investment Officer | ZeroDivide**

Laura is Chief Community Investment Officer at ZeroDivide™, a California based foundation that invests in community enterprises that leverage technology to benefit people in low-income and other underserved communities. She is responsible for the foundation's grants, initiatives and policy work.

Prior to joining ZeroDivide, Laura was Deputy Assistant to the President and Deputy Director of the White House Office of Public Liaison in the Clinton Administration. Prior to her tenure at the White House she was Associate Director of Legislative Affairs for the U.S. Department of Labor.

Laura also served as Legislative Director to the late Congresswoman Patsy T. Mink of Hawaii. She is a recipient of the Women's Information Network Young Women of Achievement Awards and a 2002 Asian Pacific American Women's Leadership Institute Fellow. She also served on the Federal Communications Commission Consumer Advisory Committee.

## EMILY EISENHART

**Team Member | Connection Concierge for SOCAPO8**

Emily is a senior at Northwestern University, where she studies Anthropology and International Studies. Long interested in global affairs and problem solving, Emily has undertaken solo and team volunteer experiences in Australia, China, India, Uganda, Egypt, and the United States. Her projects have ranged from English as a Second Language with students in Rajasthan, India to computer literacy training with former child soldiers in Uganda to refugee art and peace building in Cairo, Egypt.

Emily is particularly interested in how art can change the dynamics of volunteer relationships and serve as a medium for cultural interaction, peace building, and development. On campus, Emily is the Co-Director of the Global Engagement Summit (GES), which provides social entrepreneurship and international development training for more than 70 students from over 30 countries each year. Emily is a member of the Connection Concierge team at Social Capital Markets 2008.

## DAVID ELLIS

**Team Member | Connection Concierge for SOCAPO8**

David works in Development at the Interfaith Youth Core (IFYC), which is an international civil society organization that is advancing the movement of religious pluralism. Prior to joining IFYC, he worked at Community Wealth Ventures, a social enterprise consulting firm in Washington, DC.

David graduated in June 2008 from Northwestern University where he studied Political Science with a focus on international politics. During his undergraduate career, he gained professional experience in corporate finance, emergency medicine, policy research, and youth leadership development. David is a member of the Connection Concierge team at Social Capital Markets 2008.

## JED EMERSON

**Managing Director | Uhuru Capital**

Jed is Managing Director for Integrated Performance with Uhuru Capital. He has written extensively about social capital markets, Blended Value, performance metrics and capital investment strategies seeking multiple returns.

He has had faculty appointments at Harvard, Stanford and Oxford Business Schools. He was founding director of REDF. Various papers he has published may be found on his website, blendedvalue.org.

## DAVID ERICKSON

**Manager | Federal Reserve Bank of San Francisco**

David manages the Center for Community Development Investments at the Federal Reserve Bank of San Francisco (FRBSF) and is the editor of the journal Community Development Investment Review.

He holds a PhD in U.S. History from UC Berkeley with a focus on economic history and public policy. He has more than five years of experience working in the affordable housing finance field for nonprofit, government, and private-sector employers. He previously received a Masters in Public Policy from UC Berkeley and has a bachelor's degree in History from Dartmouth College. He has written a book on the history of affordable housing policy that is forthcoming from Urban Institute Press.

## PATRICIA FARRAR-RIVAS

**Managing Partner and Founder | Veris Wealth Partners**

Patricia is the Managing Partner of Veris Wealth Partners, a national, SEC registered, wealth management firm focused on sustainability. Headquartered in New York City, Veris is committed to aligning client's wealth with their personal values using sustainable solutions. Since 1986 Patricia has helped found and grow successful businesses and nonprofit organizations with a focus on Sustainability and Social Justice.

She began her financial services career in 1992 at Progressive Asset Management - an Oakland based Socially Responsible Investment Firm - by launching their New York Office. For the last sixteen years Patricia has provided wealth management services to individuals, families, family offices and nonprofit institutions. In 2001 Patricia joined Frank, Rimerman & Co LLP to establish and build Frank, Rimerman Advisors LLC.

After a successful career, Patricia saw the need for an independent, sustainable wealth advisory and joined four partners founding Veris in July of 2007. Patricia leads Veris' partnership with Envestnet Asset Management co-building the Sustainability Platform™: America's leading sustainable investing platform.

#### **JILL FINLAYSON**

##### **Web Marketing Manager | Social Edge**

Jill manages marketing for Social Edge, the global online community where social entrepreneurs and others in the social benefit sector connect to network, learn, and share resources. Through discussions, videos, and blogs, Social Edge shares practical information from experts and inspires social entrepreneurs to start, build, and scale social ventures.

Jill is a seasoned web 2.0 marketing and online fundraising expert. She has worked for several Internet startups, including eBay, where she was a senior category manager for nearly five years and a member of the first governance committee for the eBay Foundation. She has developed Internet training materials for small business owners and nonprofit leaders, and is the coauthor of two McGraw Hill books: Fundraising on eBay and How to Make Money Online with eBay, Yahoo! and Google. Jill earned her Bachelors degree from the University of California at Berkeley.

#### **WILLIAM F. FOOTE**

##### **Founder and President | Root Capital**

William began his career as a financial analyst in the Latin American Corporate Finance group at Lehman Brothers, and as a journalist in Mexico and Argentina.

In March 2008, he was named a Young Global Leader by the World Economic Forum for his professional accomplishments, commitment to society, and potential to contribute to shaping the future of the world. In September 2007, William was named an Ashoka Global Fellow, for his commitment to systemic social change.

William is a life member of the Council on Foreign Relations. He serves on the steering committee and is a founding member of both the Finance Alliance for Sustainable Trade (FAST) and the Aspen Institute's Aspen Network for Development Entrepreneurs (ANDE).

In 2006, he was named one of the Boston Business Journal's "40 Under 40," which recognizes leading young innovators in the Boston area. William holds a B.A. from Yale University and a M.Sc. in development economics and economic history from the London School of Economics. He is fluent in Spanish and Portuguese.

#### **TIM FREUNDLICH**

##### **Principal | Good Capital**

Tim is a highly regarded innovator in new financial instruments in the community development and social investment sector. Over the last ten years, he has served in a number of capacities at Calvert Social Investment Foundation, including his current role as Director, Strategic Development.

While there, Tim launched Calvert Giving Fund, and has helped launch Calvert Community Investment Partners, an analysis and asset administration group for community development and social enterprise investment, with approximately \$50 million under administration.

He received a BA from Wesleyan University and an MBA from the University of San Francisco. Tim spends much of his free time as an advisor to various nonprofits, including Social Venture Partners International, where he was a national Board Member, and a Founding Partner of SVP Bay Area. He is also a Strategic Advisor to xigi.net, an emergent landscaping environment for the social purpose capital market. He is an accomplished social entrepreneur in his own right.

#### **JIM FRUCHTERMAN**

##### **President, CEO & Founder | Benetech**

A technology entrepreneur and engineer, Jim has been a rocket scientist, founded two of the foremost optical character recognition companies, and developed a successful line of reading machines for the blind. He is now a leading social entrepreneur through his deliberately nonprofit technology company, Benetech. Benetech concentrates on applying technology to challenging problems facing our society, including literacy for people with disabilities and human rights monitoring and analysis.

Jim has won numerous awards for his work, including the 2006 MacArthur Fellowship and the Skoll Award for Social Entrepreneurship in 2004 and 2006. He was named a Schwab Social Entrepreneur of 2003, which has included attending and speaking five times at the World Economic Forums in Davos, Switzerland. Jim believes that technology is the ultimate leveler, allowing disadvantaged people achieve more equality in society.

#### **KATHERINE FULTON**

##### **President | Monitor Group**

Katherine has spent three decades chronicling and catalyzing social change as a leader, strategist, teacher, editor, writer, speaker and advisor. She is currently president of Monitor Institute and a partner at the global firm Monitor Group.

Monitor Institute is part consulting firm, part think-tank, and part

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incubator of new approaches—all in the service of helping innovative leaders develop and achieve sustainable solutions to significant social and environmental problems. The Institute works globally, but has business offices in Cambridge, New York, and San Francisco, where Katherine is based.

Katherine is passionately interested in how private resources can be used more effectively to create public good, and in recent years, her work has increasingly focused on how philanthropy and social investing can adapt to a rapidly evolving global context. She has advised many of this generation's leading philanthropists and foundations, given dozens of major speeches, and written several well-known publications on the future of philanthropy.

## ELIZABETH FUNK

### Chairman of the Board | Unitus

Elizabeth is actively involved in supporting rapid growth and commercialization in the Microfinance industry, which provides small loans to the world's poor allowing them to start businesses and build their own way out of poverty. She is the Chairman of the Board of Unitus, a leading Microfinance accelerator. She is also a co-founder and Board member of Unitus' for-profit sister company, Unitus Investment Group, and the founder and CEO of the Dignity Fund, a debt fund for Microfinance.

Prior to becoming Chair of Unitus, Elizabeth served as the President and CEO of CML Global Capital, a diversified international investment firm. Prior to joining CML, Elizabeth was one of the earliest employees of Yahoo!, where she helped formulate Yahoo!'s initial shopping, online Finance and commerce strategy. She is an active member of the Young President's Organization (YPO) serving as the Chair of the Board of the Pacific Region, and as a founder of the YPO initiative, Social Enterprise Networks.

## KIRSTEN GAGNAIRE

### Principal | Social Enterprise Group

Kirsten has a passion for addressing social and environmental issues through profitable business ventures and is a national leader in the field of social enterprise. She founded Social Enterprise Group (SEG) in 2000 with a vision to solve complex problems with tangible tools that are accessible to social enterprise practitioners.

In her quest to find a scalable way to provide technical assistance to this field, she partnered with Gifford Pinchot III, author, environmentalist and Founder of Bainbridge Graduate Institute, to develop the comprehensive methodology, Sustayne, designed to lead entrepreneurs through the development of their social ventures.

Kirsten is currently writing her first book Starting and Growing a Social Enterprise: a Hands-On Guide to Social Ventures and Sustainability, to be published by Jossey-Bass summer 2009. She holds a degree in International Business from Seattle University and lives on Vashon Island, WA with her two amazing children, Sophie and Xavier.

## ALAN GERSHENFELD

### Managing Partner | E-Line Ventures

Alan is Managing Partner of E-Line Ventures, a "double bottom line" venture fund focused on empowering individuals, small businesses and underserved communities through popular media and personal fabrication.

Prior to E-Line, Alan was CEO of netomat, a leader in mobile-web community solutions. Before netomat, Alan was a member of the executive management team at Activision which rebuilt the company from bankruptcy into a multi-billion dollar leader in interactive entertainment. Before Activision, Alan spent ten years in the film industry where he worked in a variety of development, production and post-production positions with credits on numerous feature film and documentaries.

Alan serves as Chairman of Games for Change and is on the Board of FilmAid International and the Advisory Boards of Scenarios USA, Splashlife and the Joan Ganz Cooney Center For Educational Media and Research.

## STEVEN GODEKE

### Principal | Godeke Consulting

Steven is an independent investment advisor who works with foundations, corporations, and nonprofit organizations to integrate their financial and philanthropic goals.

His clients include The Rockefeller Foundation, The Bill & Melinda Gates Foundation, The John D. and Catherine T. MacArthur Foundation, The World Economic Forum and corporate clients in the financial services and pharmaceutical industries.

Steven is co-author of Philanthropy's New Passing Gear: Mission-Related Investing, A Policy and Implementation Guide for Foundation Trustees, published earlier this year by Rockefeller Philanthropy Advisors. Steven is an adjunct professor at New York University's Center for Global Affairs where he currently teaches a course in Microfinance and Social Entrepreneurship.

Steven grew up on a family farm in Southern Indiana, and attended Purdue University where he received a B.S. in Management and a B.A. in German. He studied as a Fulbright Scholar at the University of Cologne and earned an M.P.A. from Harvard University. He currently lives in New York City.

## JOHN GOLDSTEIN

### Co-founder & Managing Director | Imprint Capital Advisors

John Goldstein is co-founder of Imprint Capital Advisors, LLC, which catalyzes capital for social impact by supporting foundations, individuals, and family offices and their trusted advisors. John is also a co-founder of and senior advisor to Medley Capital Management (MCM), a private

investment firm that actively serves the development finance and social enterprise markets.

Prior to forming MCM, John was co-founder and Executive Director of the Medley Institute, where he worked (and in many cases continues to work) as a board member, senior advisor or team member, including Global Giving, Distributed Capital, the International Interfaith Investment Group (3iG), Keystone/Access, the Sustainable Food Lab, Aquaya, TBLI (Triple Bottom Line Institute), the Global Exchange for Social Investment (GEXSI) and the United Nations Capital Development Fund.

John also worked as a management consultant in the Strategy practice of Andersen Consulting (now Accenture). John was an honors graduate of Yale University where he was awarded the Richter Fellowship and the Townsend Prize.

#### **RON GONEN**

##### **CEO | Recycle Bank**

A sharp brain with a soft heart, Ron has always felt strongly about examining the true cost of business, and what can be accomplished by creating better and more efficient systems.

Which, after two degrees and several consulting management positions, led him to dinner with an old friend and a single question: Why shouldn't people be rewarded for recycling? This was the challenge that spurred Ron to create an entirely new species of green, incentive-based recycling. Soon, Ron was in the world of mechanical garbage truck arms, chip scanners and wireless data servers. Seeing his idea through meant developing the best technology, finding the right people to help, and getting a bit lucky.

In 2004, after raising \$50m in capital, RecycleBank became a breakthrough reality and huge coup in waste management that has already won accolades across industries. RecycleBank now has over a hundred thousand participating households, and is expanding.

#### **ARUN GORE**

##### **Managing Director and Principal | Gray Ghost Ventures Social Venture Fund**

Arun comes to social venture capital investing after executive roles in information and communications technology companies. He brings his entrepreneurial skills, general management experience and commitment to economic development to Gray Ghost Social Venture Fund's management, international operations, portfolio development and social and financial value creation.

In addition to Gray Ghost, Arun runs a business operations and management consulting practice since 2006, which includes managing joint ventures for T-Mobile, establishing Indian operations for US firms and promoting private equity investments for start-ups.

Before joining T-Mobile, Arun led the international operations of SAI Inc., an energy and oil field supplies company operating in over 13 countries in Europe, Asia and Middle East. Early in his career, he worked as a financial controller and held various accounting and finance positions.

Arun has a BSc (Science) from India, he also has BS (Accounting) and MBA (Finance) degrees from the USA.

#### **JONATHAN GREENBLATT**

##### **CEO | GOOD Worldwide**

Jonathan is the CEO of GOOD Worldwide, Inc., a successful social entrepreneur and an acknowledged thought leader on ethical branding.

Founded in 2006, GOOD Worldwide is an integrated media company for people who want to live well and do good. Its products include the award-winning print title, GOOD Magazine; live events; and www.GOOD.is, an online destination updated daily with fresh editorial and video features.

Jonathan also co-founded Ethos Water, the premium bottled water that helps children around the world get clean water. In 2005, Starbucks Coffee Company purchased Ethos Water, one of only a handful of non-coffee business acquisitions in Starbucks' 30-plus year history.

Jonathan also served as an aide in the Clinton White House and US Department of Commerce. He is a faculty member at the Anderson Graduate School of Management at UCLA, where he teaches social entrepreneurship. Jonathan lives with his wife, Marjan, and their two sons in Los Angeles.

#### **DAVID GRISWOLD**

##### **President | Sustainable Harvest**

David has been working with small-holder coffee growers since 1989 when he began helping organic coffee cooperatives find new markets for their Mexican coffee. He and a group of farmers co-founded Aztec Harvest, the first coffee importing and marketing office owned by small-scale Mexican coffee growers.

Previously, David worked extensively in international development and as a journalist in the developing world. He served as the Acting Director for Ashoka: Innovators for the Public. And he was Director of Coffee Programs for Conservation International.

He has served as President of the Specialty Coffee Association of America (SCAA), and led the association in its first Sustainability Conference. In 2008, David received the SCAA's Outstanding Contribution Award.

David has served on the International Coffee Organization's Sustainable Task Force, the Advisory Board for Coffee Kids, and the Board of Directors of the SCAA. He is currently the Chair of the SCAA's International Relations Council.

# SOCAPO8 SPEAKERS {CONTINUED}

## KAREN DOYLE GROSSMAN

### Senior Director | Mercy Corps

Karen is Senior Director of Social Innovations at Mercy Corps. Previously, she served as executive director for the Aspen Institute's Young Leadership Initiative and managed its Socrates Society program for technology-focused private and social sector entrepreneurs.

For four years, she was associate director of Aspen's Economic Opportunities Program, funding and evaluating innovative anti-poverty strategies through its Fund for Innovation, Effectiveness, Learning and Dissemination (FIELD).

Karen has published extensively on microfinance and enterprise development, including the first major study of microfinance in conflict zones, *Microfinance in the Wake of Conflict: Challenges and Opportunities*, for the U.S. Agency for International Development.

Karen holds a B.A. in Government from the University of Virginia and a Master's Degree in Education Policy Studies at The George Washington University. She lives in Virginia with her husband, Brian, and their three children.

## ROBIN HACKE

### Director of Capital Formation | Living Cities

Robin is responsible for creating and managing a variety of social investment vehicles including the Living Cities Catalyst Fund, a convenient way for social investors to provide below-market rate debt to outstanding not-for-profit organizations. In her previous role as a venture capitalist and entrepreneur, she raised over \$72 million from institutional, corporate and individual investors and built a portfolio of investments in 20 start-up companies.

Robin has spent most of her career guiding the growth of technology companies as a manager, consultant and director. She founded and ran a strategy-consulting firm that worked with 110 clients, and she

currently serves as a director and Audit Committee Chair of Alvarion, a wireless communications company traded on Nasdaq.

Before entering the tech sector, Robin was a banker in the Public Finance Department at Shearson Lehman Brothers, where she structured mortgage-backed bonds. She earned an MBA from Harvard Business School and a BA magna cum laude in Government from Harvard-Radcliffe College.

## PRIYA HAJI

### CEO & President | World of Good

As co-founder and CEO, Priya is the award-winning leader of World of Good, a nationally distributed fair trade gift company with more than 1,200 retail partners. Priya knew she wanted to build a company that impacted women on a global scale and started developing the idea during her MBA program at the Haas School of Business. Since 2004, World of Good has worked with more than 6,000 artisans in 34 countries who, as a conservative estimate, are responsible for more than 25,000 dependents.

Most recently, Priya received a Social Innovation Award from the Social Venture Network for her vision to change the way the world does business, and was featured as a panelist to speak on the value of hybrid business models at the 2008 Skoll World Forum for Social Entrepreneurship in Oxford, England.

In her 20's, Priya was recognized by the DoSomething Foundation, MTV, and Mademoiselle Magazine as one of America's Ten Most Outstanding Young Leaders.

## HARRY HALLORAN

### Founder | Halloran Philanthropies

Harry founded the Halloran Philanthropies in 2007 with the belief that business is one of the most powerful drivers for positive social change. The purpose of the Halloran Philanthropies is to help create a healthier

world community that promotes economic development through microfinance, clean energy, global ethics and community service to revitalize low-income communities throughout the world.

Harry is Chairman and CEO of both American Refining Group and of ARG Resources. He is a graduate of the University of Pennsylvania with a degree in Civil Engineering. After graduating, he entered the Augustinian seminary for four years and earned an M.A. in Theology.

Harry is the founder and CEO of Energy Unlimited, Inc. a company involved in the renewable energy field and has served on the Board of The American Wind Energy Association. Other past positions include Trustee of Villanova University, College of Commerce and Finance, and Trustee of The Academy of Natural Sciences. He is also the Founding Trustee of The Enlightened World Foundation and the Halloran Foundation.

## MARC HAND

### Managing Director | Public Radio Capital

Marc co-founded Public Radio Capital in 2001 with Susan Harmon and serves on PRC's board. As Managing Director, Marc builds strategic public radio alliances, educates financial institutions on public radio investments, and provides expertise on all aspects of public radio transactions.

During his 28 years in the Radio Industry, Marc has served as: Managing Partner and co-owner of a group of commercial stations in Colorado, Vice President of Questcom Radio Brokerage representing station owners in sales, acquisitions, mergers and financial restructurings, Executive Director of Western Community Bilingual radio, founder of four stations, and consultant for CPB, NPR, and NFCB.

Marc spent five years at the Station Resource Group (SRG) helping public radio stations expand services via acquisitions, collaborations and partnerships, leading to the development of PRC.

**ROBERT HANNA**

**Senior Partner | Social Wealth Partners**

Among 20 years of leadership roles in business, philanthropy, nonprofit, government and community initiatives, Robert has served as President at Dominick & Dominick Futures Management, Inc., as Director of The Rensselaerville Institute, as a Founding Board Member of Social Venture Partners International, and as Community Development Commissioner in Austin, Texas.

Robert is currently Senior Partner at Social Wealth Partners and leads his own investment company, Social Wealth Investment Management Corp., towards earning private and public profits.

**JONATHAN HARRISON**

**Director | Rubicon National Social Innovations**

Jonathan is a seasoned social entrepreneur who has devoted his career to building and running community-based enterprises.

Prior to joining RNSI, he led lending programs at MACED in Berea, Kentucky, a community development financial institution (CDFI) focused on lending to viable but unbankable small businesses.

In 1998, Jonathan co-founded alt.Consulting, a social mission driven consulting firm and led the organization as Executive Director for its first five years.

In addition to starting and operating social entrepreneurial ventures including food coops and nonprofit bakeries, Jonathan was a fellow of the Kenan Institute of Private Enterprise and business consultant with the North Carolina Institute of Minority Economic Development. Earlier in his career, he spent time in marketing management at Carnegie Hall, and was faculty instructor at the Xi'an Institute of Finance and Economics in the Peoples' Republic of China. He has an MBA from the Yale School of Management.

**XAVIER HELGESEN**

**Co-Founder | Better World Books**

Xavier graduated Cum Laude from the University of Notre Dame with a degree in Management Information Systems. Before co-founding Better World Books, he founded and sold 3bstudios.com, a successful and profitable college community portal company.

Xavier served as the original software architect of Better World Books' proprietary software (Indaba) technology and continues to oversee key aspects of technology development while also serving as the Company's head of both domestic and international business development efforts. Xavier is based in San Francisco, California.

**ERIC HENDERSON**

**Director of Communications | Living Cities**

Previous to Living Cities, Eric served as Director of Account Management for the Chicago marketing firm commonground. His career has spanned multiple industries and sectors, with 14 years of marketing leadership in the U.S. and abroad with General Electric, Citigroup, Xerox, The Pepsi-Cola Company, and Management Leadership for Tomorrow. As a regular contributor to the industry publication, AdAge, Eric is a recognized thought leader in marketing and advertising.

Eric is also lead adviser on marketing/branding for the Socrates Society Seminars, a program of the Aspen Institute. He is an avid marathoner as well as an accomplished fine art photographer, having been recognized in The New Yorker magazine for works exhibited at The Studio Museum in Harlem. He earned his MBA from the Thunderbird School of Global Management (Glendale AZ), including one year at ESADE (Barcelona, Spain). He completed his B.A. in Communications at Texas A&M University. He is fluent in Spanish and Portuguese.

**R. PAUL HERMAN**

**Founder and CEO | HIP Investor**

Paul has focused his life on solving human problems in business, nonprofit and government operations. He has experience as an entrepreneur, management consultant at McKinsey and CSC Index, chief development officer at Ashoka.org, and investment strategist at eBay founder Pierre Omidyar's Network.

As the founder and CEO of HIP Investor, Paul advises investors, companies and entrepreneurs (both business and social) to solve human problems for sustainable, profitable growth. Paul graduated from the Wharton School of Business at the University of Pennsylvania, and has lectured at Stanford, Harvard, Wharton, and U.C. Berkeley, as well as networks of Echoing Green social entrepreneurs, Net Impact MBAs, and international Fulbright Scholars.

**KURT HOFFMAN**

**Director | Shell Foundation**

Kurt has more than 30 years experience as a respected academic, a successful social and commercial entrepreneur, designer and implementer of strategic change initiatives tackling global poverty and environmental challenges, and as the architect of Shell Foundation - an influential and internationally recognised innovator in the fields of corporate social responsibility, climate change and poverty alleviation.

He has leveraged \$40m of Foundation spending into \$400m+ of investments by others (often on commercial terms) to create, for example, The Better Trading Company - an African based, commercial enterprise that develops internationally competitive supply chains of small scale producers of organic, sustainable and fairer trade products servicing large international retailers.

Kurt was made a Fellow of the UK Royal Society of Arts in 2003. He recently stepped down as Director of Shell Foundation to join "Lion's Head Global Partners" to provide strategic business development advice and financing advice and assistance to social and commercial enterprises in emerging economies.

# SOCAPO8 SPEAKERS {CONTINUED}

## LANA HOLMES

### Operations | Om Direct

Lana Holmes has owned and operated three businesses in consulting, manufacturing and outdoor adventure and has functioned as a CEO, COO and VP of Sales. Her most recent venture, Olive Branch Associates, focused on executive team development and entrepreneurial coaching.

Prior to founding Olive Branch Associates, Lana was Founder and CEO of The Newhouse Group, a 60-plus-member virtual business and organizational development consulting firm that specialized in “drop-in” infrastructure for start-ups, posted annual profits of \$3.4 million in the first 3.5 years.

During the previous 12 years, Lana has been involved on some level with the launch of multiple start-up ventures during both pre- and post-funding stages. Currently, Om Direct, Inc. is her 40th start-up effort. Lana lives on a working, off the grid organic farm in Anderson Valley, CA where she and her partner are cultivating truffles.

## JIM HORNTAL

### Venture Partner | CMEA Ventures

Jim is the Lester Center Fellow for Entrepreneurship and Innovation at the Haas School of Business at UC Berkeley. He and his wife, Bethany, are both active philanthropists, with Jim’s primary focus being in the area of US-Arab relations and the Middle East. He is also an active member of the Council on Foreign Relations.

Jim was the Founder and Chairman of Preview Travel, one of the first online travel agencies. In 2000, Preview Travel merged with a division of Sabre Holdings to create Travelocity.com, where Jim served as Vice Chairman until 2002.

A long, long time ago, Jim received a BA in Economics from Princeton University, and an MBA from Harvard Business School. He now lives

in San Francisco with his wife Bethany, their son Joshua (17) and a rather independent-minded golden doodle named Snicker (4). His daughter, Becca, is a sophomore at Tufts University.

## PAUL HUDNUT

### Founder and Director | Envirofit International

Paul is an entrepreneur, unrepentant optimist and educational arsonist. He teaches entrepreneurship courses at Colorado State University and the Bainbridge Graduate Institute. His background and interest is in building companies in the bioscience, energy and information services industries. Paul is particularly interested in building what he refers to as H.E.R.O.s- Human and Environmentally Regenerative Organizations that use entrepreneurial approaches to transform industries for a more sustainable economy.

Paul is a founder and director of Envirofit International, Ltd., which was a TechAward laureate in 2005 and won a World Clean Energy Award in 2007. He is a board member of New Belgium Brewing Co. and Chairman of Inviragen.

Paul earned his BA from Colorado College and his law degree from University of Virginia and completed the Program for Management Development at the Harvard Business School in 1991.

## CARLA JAVITS

### President | REDF

Under Carla’s leadership, REDF helps to create and grow “social enterprises” – small businesses that employ people who otherwise are not likely to obtain or retain a job. She also oversees REDF’s efforts to build the field by broadly sharing the results of its extensive, multi-year effort to measure outcomes demonstrating the effectiveness of social enterprise in helping people with multiple barriers move into the workforce.

Prior to joining REDF, Carla was with the Corporation for Supportive

Housing (CSH) for fifteen years, leading it for the last six. She has also worked as a policy and budget analyst for the State of California and as Director of Policy and Planning for the San Francisco Department of Social Services. Carla was appointed to the Board of Directors of the State of California Housing Finance Agency, and is on the Board of Directors of The Philanthropic Initiative and Northern California Grantmakers. She holds both a Masters of Public Policy and BA from the University of California, Berkeley.

## LINDA M. JENKINSON

### Managing Director | WOW Investments

Linda is a serial entrepreneur who has built multi-million dollar companies, is now engaged in leveraging her global network in social venture and philanthropic ventures. Linda is a Managing Director and founder of WOW Investments, a nonprofit social investment fund focused on building women based SME’s in West Africa.

Linda is the Chairman and founder of LesConcierges, the largest luxury corporate concierge company in the world. She is a founder of Porthos Ventures, a high-end wine Internet concierge company.

Linda has taken a company public on the NASDAQ and received multiple awards for her entrepreneurial efforts in the United States, the United Kingdom, New Zealand and Australia.

Linda has an MBA from The Wharton School – University of Pennsylvania and a BBS from Massey University in New Zealand. She lives in Marin with her husband and her 2 children, Tristram and Isabelle.

## R. TODD JOHNSON

### Founder and Partner-in-Charge | Jones Day

Todd is founder and Partner-in-Charge of Jones Day’s Silicon Valley Office, where his practice focuses on renewable energy companies, energy efficiency companies, companies focused on sustainability, internet companies in the cause social networking space and “for-

benefit" corporations. Todd serves as regular counsel to SunPower, SearchMe, Funny or Die, Fair Trade Films and Green Harvest Technologies, and has served as regular counsel for Santur, GoodGuide, Metering Technology, Notiva, APAK, and LaborFair.com, and works with founders in the formation, venture financing and liquidity phases of start-ups.

Todd provides pro bono assistance to organizations such as the Grameen Trust, an African SME fund, and Fair Trade Films, and advises organizations advancing the "for-benefit" sector, including the Aspen Institute, Good Capital, GlobalGiving, B Labs and Pura Vida Coffee. In the past several years, Todd has been quoted for his work on behalf of "for-benefit" corporations in publications such as the New York Times and Inc magazine.

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#### **KEVIN JONES**

##### **Principal | Good Capital**

Kevin is a successful serial entrepreneur now giving his time to younger entrepreneurs through Good Capital, which is raising a social venture fund. An old hand at creating information hubs in emerging markets, he is also the lead convener of **SOCAP08**.

Kevin's former positions include CEO of Net Market Makers, an \$18 million revenue online community and research and events company. Together with his wife and their team, he built Net Market Makers into the largest brand in business-to-business Internet commerce.

Kevin has been a columnist for Forbes and Business 2.0 magazines. He has been on the boards of Social Enterprise Alliance, Social Venture Partners International, and the founding board of Parents for Public Schools. Working with Jeffrey Sachs of The Earth Institute he led a malaria project in Swaziland and Mozambique.

Kevin has two children who are making a difference in the world and two magnificent young grandchildren.

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#### **ANDREW KASSOY**

##### **Co-Founder | B Corporations**

Prior to co-founding B Corporations, Andrew spent 16 years in the private equity business; as a Partner at MSD Real Estate Capital, an affiliate of MSD Capital, the \$12 billion investment vehicle for Michael Dell, and as Managing Director in Credit Suisse First Boston's Private Equity Department, a founding partner of DLJ Real Estate Capital Partners, and President of its international business.

He is a Board Member of the Freelancers Union and the Freelancers Union Insurance Company, a Board Member of Echoing Green, an Advisory Board member of Wall St. Without Walls, and a member of the investment committee of the Patient Capital Collaborative. He was raised in Boulder, Colorado and graduated with Distinction from Stanford University where he was a Truman Scholar and President's Award winner. He is a Henry Crown Fellow at the Aspen Institute. Andrew lives in New York City with his wife, Kamy Wicoff, a writer, and their two sons, the Emperor Maximilian (four years) and the Boy King Jedidiah (two years).

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#### **ROB KATZ**

##### **Knowledge and Communications Associate | Acumen Fund**

Rob is a Knowledge and Communications Associate with Acumen Fund. Before joining Acumen Fund, Rob was an Associate with the Markets and Enterprise Program of the World Resources Institute.

Rob researches, writes and speaks about "base of the pyramid" business approaches to poverty alleviation and environmental degradation. He is the co-founder and co-Managing Editor of [www.NextBillion.net](http://www.NextBillion.net), a web site and blog about enterprise and development. As a principal analyst of household survey data and co-author for *The Next 4 Billion: Market Size and Business Strategy at the Base of the Pyramid* (March, 2007), he studied BoP market structure and spending patterns extensively.

Rob has consulted with a number of Fortune 500 corporations on BoP

strategy, spoken to conferences around the world, and done scenario work for institutions such as the XPRIZE Foundation and the Institute for the Future, among others. Rob holds a B.A. in Political Economy from Georgetown University.

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#### **LIZ KEITH**

##### **LawHelp Program Manager | Pro Bono Net**

Liz received a self-tailored master's degree in community informatics from the University of Michigan School of Information, where she was a consultant to community information projects for the Digital Partners Social Enterprise Laboratory and the Alliance for Community Technology in Haiti and Chile.

Prior to graduate school, Liz served as Director of Communications and Development at the Maine Women's Policy Center. She lives in the San Francisco Bay Area.

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#### **ALISON KING**

##### **Independent Consultant**

Alison merges design process with business analytics to convert long-range problems into manageable parts for the purposes of high-impact measurement and technology development.

She has an MBA from Carnegie Mellon and a Masters of Science in Product Design from Stanford University. Her work experience and consulting engagements have provided exposure to a myriad of industries including health care, retail and online media.

She spent six years at CNET Networks developing the discipline of yield management. She also helped launch Sphere Clothing, an organic clothing company, and she has been designing and handcrafting jewelry and shoes for over a decade. Alison seeks out new business models to untangle and opportunities to grow companies that create good beyond the bottom line.

# SOCAPO8 SPEAKERS {CONTINUED}

## MADS KJÆR CEO | MyC4

Mads' key competences are in leadership, entrepreneurship, and innovation. He started the creation of MyC4 in 2005 together with Tim Vang and established the company in 2006.

Prior to this, Mads has been working in Kjær Group A/S since 1984, the last 20 years as CEO, and from August 2006 as the Chairman. Kjær Group A/S was awarded Denmark's Best Workplace in 2003 and 2004 and between Europe's 10 Best Workplaces in 2005.

Mads has 25 years market experience from emerging countries and lived in Zimbabwe, Uganda, South Africa and is the Honorary Consul for Ethiopia in Denmark.

## CHARLY KLEISSNER Co-founder | The KL Felicitas Foundation

Charly is a philanthropic entrepreneur utilizing his high technology background in his venture philanthropy. He is co-founder of the KL Felicitas Foundation and the Social-Impact initiative, and serves on the Advisory Board of multiple not-for-profit companies like Acumen Fund, Global Social Benefit Incubator, Alliance for a New Humanity, and Global Philanthropy Forum. He has over twenty years of experience as a senior technology executive in Silicon Valley.

Charly is now focusing on breaking down the barrier between the for-profit sector and the not-for-profit sector by creating social enterprises as hybrid business structures, insisting that both vehicles can be effective for achieving social change.

Charly earned his M.S. and Ph.D. in Computer Science specializing in distributed databases from the University of Technology, Vienna. He authored two software patents and published numerous articles. In 2004, Charly received the 'Distinguished Alumnus' award from the University of Technology, Vienna.

## LISA KLEISSNER President | KL Felicitas Foundation

Lisa is the President of the KL Felicitas Foundation, a family foundation she co-founded with her husband, Charly, in 2000. The Foundation is dedicated to supporting programs that empower rural communities and families, enable social entrepreneurs worldwide, and that advocate their Foundation's sustainability, mission, and social investment strategy.

Lisa provides pro-bono architectural, project and construction management services for nonprofits both locally and internationally with a focus on culturally appropriate and sustainable design. Additionally, Lisa has led fund raising efforts for a variety of both local and international nonprofits focusing on capital and endowment campaigns.

Lisa was raised in Hawaii, attended the Kamehameha Schools and the University of Hawaii at Manoa graduating with a BA in Environmental Design. She was the Vice President of an architectural firm in Hawaii doing work in Hong Kong, Singapore, Sri Lanka and Malaysia. Most recently she was the president of The Kleissner Group, an architectural and project management firm in Silicon Valley.

## JEFF KOSITSKY Executive Director | Community Housing Partnership

Jeff has been working in the nonprofit sector since 1989. He brings extensive expertise in the field of affordable housing, including housing development, tenant services and program development. In addition, Jeff has worked on community development projects both in the United States as well as internationally.

He holds a Master of Public Affairs from the University of Texas and a B.A. in Economics and International Studies from American University. He also serves as a board member for the Coalition on Homelessness and for the San Francisco Information Clearinghouse.

## LLOYD KURTZ Senior Portfolio Manager | Nelson Capital

Lloyd is a senior portfolio manager at Nelson Capital. Before joining Nelson Capital in 2004, he was a Senior Vice President at Harris Bretall Sullivan & Smith in San Francisco where he served as Director of Quantitative Research and provided research coverage for the healthcare, basic industry and energy sectors.

Before joining Harris Bretall in 1995, he spent four years as Senior Research Analyst at the research firm KLD, where he did much of the initial quantitative work in the development of the Domini Social Index.

Lloyd is a Lecturer at the U.C. Berkeley Haas Business School's Center for Corporate Responsibility, and serves as Program Administrator for the Moskowitz Prize. He has published numerous articles on social investing in academic journals, and authored a chapter on social investing for the 2008 Oxford Handbook of Corporate Social Responsibility.

He holds a B.A. from Vassar College, an M.B.A. from Babson College, and is a Chartered Financial analyst.

## PAUL LAMB Principal | Man on a Mission Consulting

Paul is a consultant and entrepreneur with over 20 years of experience in business, nonprofit management, technology and public policy. He is currently the Principal of Man on a Mission Consulting. Paul is a founder and former Executive Director of The Stride Center, an award-winning program providing computer training and job placement for low-income and underserved youth in San Francisco's East Bay. He has developed several other successful nonprofit programs and social enterprises in the areas of youth, workforce development, and technology.

Paul is also a frequent radio commentator and OpEd contributor on

technology and social issues in a variety of publications including NPR's Marketplace and on CNET.com.

Paul is the co-author of the Be A Better Partner Handbook for Couples. He is also the founder of the Cool 'n Conscientious blog, and is a contributing blogger on SmartMobs.com and PBS's IdeaLab blog.

#### **ROBERT LAPIDES**

##### **Managing Member & CEO | Pico Bonito**

Robert is an investor and principal architect, along with two founding nonprofit organizations, in the formation of the Pico Bonito business model and financing structure. Now in its fourth year of operation, Pico Bonito is a pioneer in blending successful models to achieve environmental, social, economic, financial, and investment objectives.

Robert serves as the principal of Robert L. Lapidés Co., LLC – a specialized private equity investment and advisory firm based in Wellesley, Massachusetts. His areas of expertise include: new fund establishment, private equity financings, portfolio company oversight, strategic relationships, and successful exit strategies. His work includes advisory, co-investment, and ongoing representation for the benefit of private equity funds, investing institutions, and high net worth individuals. He has over 20 years of experience in the private equity and nonprofit sector. He serves as advisor and/or board director to a variety of private equity groups, operating companies, and nonprofit organizations.

#### **PHILIP LAROCCO**

##### **Founder and CEO | E+Co**

Philip is the founder and CEO of E+Co, an organization recognized for providing access to clean energy for more than 4 million people in developing countries. As the pioneer and leading practitioner of the enterprise-centered model of clean energy implementation, since 1994, E+Co has made over two hundred investments in energy enterprises in Africa, Asia and Latin America.

Having formerly served as the Director of World Trade and Economic Development for the Port Authority of New York and New Jersey, Philip has brought over 25 years experience in international business and project development to E+Co. In addition to his duties for E+Co, Philip concentrates on innovative financing mechanisms and teaches a graduate course on Energy and Development at Columbia University's School of International and Public Affairs.

A sought after speaker, Philip is a remarkable presenter and presented the keynote at various conferences including the World Renewable Energy Conference in Italy, Engineers Without Borders' Bridging the Gap, and contributed to Yale University's Development Finance Forum and the Prince of Wales Business and Environment Program.

#### **BRIAN LEHNEN**

##### **Executive Director | Village Enterprise Fund**

As a leader and innovator in grant-based microenterprise development, Brian, has demonstrated the importance of this tool in the fight against poverty. Brian's career in economic development has focused on innovation in grassroots poverty alleviation. He developed a model of microenterprise development that is both simple and elegant which has shown proven results in providing sustained income and lasting benefits for the poor. The program of small business grants that Brian developed offers critical leverage by providing grassroots capital and training.

Brian truly believes in the ability of the poor to fight poverty through their own intellect and hard work. Speaking to over 600 micro enterprise businesses in East Africa over the last 15 years, he has learned first hand what they need to fight poverty. "The poor are the ones who best know how to improve their lives, our job is to give them the tools that can empower them."

#### **SCOTT LEONARD**

##### **CEO | Indigenous Designs**

Scott is the CEO of Indigenous Designs, a Santa Rosa, California, company that markets fair trade and organic sportswear.

Back in 1993 on a trip to South America, Scotty encountered the priceless beauty of the local artisans. The richness of the culture and amazing knitting techniques prompted him to bring back more than a souvenir to his Northern California home. He returned with a vision to pioneer a new business model that would invite each of us to wear our commitment to the people and environment.

He was also instrumental in developing Green Steps in the Outdoor Industry, an initiative designed to help the industry exchange, elevate, and practice sustainability ideas.

#### **LEONARDO LETELIER**

##### **CEO and Founder | sitawi**

Leonardo has always navigated between corporate business and nonprofit sectors, having worked across a diverse range of issues such as financial derivatives and anti-trust regulation.

sitawi's mission is to create a new financial infrastructure for the social sector in Brazil, by financing new income sources connected to social transformation initiatives and fostering the adoption of business features in the mindset & decision making process of social leaders – one 'Supported Social Loan' at a time.

Prior to founding sitawi, Leonardo worked at McKinsey for eight years helping clients from the Energy and Telecommunications industry in their strategic, organizational and operational challenges. He also launched and led Ashoka's Full Economic Citizenship initiative in Brazil, currently piloting a housing services center in low-income communities.

# SOCAPO8 SPEAKERS {CONTINUED}

He holds an M.B.A. from Harvard Business School, and a B.S. in Industrial Engineering from Escola Politécnica, Universidade de São Paulo. Leonardo is married and he's fluent in Portuguese, Spanish, English, and French.

## JOSHUA LEVINE

**The Levine Social Investment Group | UBS Financial Services**

Joshua heads up The Levine Social Investment Group at UBS Financial Services. The team focuses on providing investment management and financial planning while empowering clients to make investment decisions that are in line with their personal ethics. Investment solutions include customized screening for all asset classes, shareholder advocacy, and community investing. Clients range from individuals to small businesses and nonprofit organizations.

Joshua received his B.S. in Civil and Environmental Engineering from the University of California, Los Angeles. Upon graduation, he moved to New York City and joined the leveraged finance division of Scotia Capital, Inc. He then moved on from his Associate role to receive his Master's degree in Environmental Science and Management from the Donald Bren School of Environmental Science & Management at the University of California, Santa Barbara.

## ADAM E. LICHT

**Director of Product Management | Pro Bono Net**

Adam joined Pro Bono Net in April 2006 as Director of Product Management. He has substantial software product management and development experience within the publishing, legal and financial service industries.

Prior to joining Pro Bono Net, he held senior product management positions with RR Donnelley, CCH Legal Information Services, A Wolters Kluwer Company and Net Exchange.com.

Adam earned an MBA from The University of Chicago, an MFA in Photography from The University of Arizona and a BFA from SUNY College at Purchase.

## ELISE LUFKIN

**Principal | Calvert Giving Fund**

Elise is working with Calvert Giving Fund (CGF) to offer a wide range of mission-aligned investment opportunities to its donor advised funds. Through her work with CGF, the investment platform is being expanded to encompass both debt and equity funds, and ultimately to include investment opportunities in individual companies.

Prior to her work with CGF, Elise operated an independent consulting company assisting foundations with the human and operational aspects of transitioning from conventional to mission-aligned investing. She worked in the nonprofit field as both executive staff and as a board member for 15 years, and has started and run two small businesses. She holds a Masters in the Science of Management from Antioch University and a BA from Yale University.

## ASAD MAHMOOD

**Managing Director | Deutsche Bank**

As Managing Director of the Global Social Investment Funds at Deutsche Bank, Asad is responsible for an over \$500 million loan and investment portfolio which seeks both a financial and social return. He is also responsible for Deutsche Bank Microfinance efforts globally, which comprise more than 85 relationships in 41 countries.

Asad was the central force in creating a pioneering \$80 million commercial microfinance fund which has raised most of its money from 13 large institutional investors in the world. He has partnered with Ashoka and International Association for the Prevention of Blindness (IAPB) to create Eye Fund 1, a revolutionary fund that will lend to hospitals providing ophthalmology services to the poor.

Asad is positioning Deutsche Bank to be an investment bank for social capital. And personally, he is looking to be a catalytic leader and innovator in the growth of financeable social ventures by bringing together differently motivated capital from development agencies, foundations and socially motivated commercial investors.

## HARLAN MANDEL

**Deputy Managing Director | Media Development Loan Fund**

Harlan serves as Deputy Managing Director of Media Development Loan Fund (MDLF), a pioneering mission-driven investment fund for independent news companies in countries with a history of media oppression. Working in Africa, Asia, the Balkans, Latin America, and Russia and the CIS, MDLF helps leading journalists in these challenging environments build sustainable businesses around professional, responsible, quality journalism.

Since 1996 MDLF has financed over 140 projects for over 70 independent media companies in 20 countries, providing over \$70 million in low-cost financing and writing off less than 2.5% in losses. MDLF currently manages a portfolio of over \$35 million. Before joining MDLF in 1998, Harlan served as Deputy General Counsel for the Open Society Institute/Soros Foundations Network, after practicing law with the firm of Morrison & Foerster from 1989 to 1996.

## JESSICA MARGOLIN

**Director of Communities | thegroupy.com**

Jessica addresses issues in the design of organizations, institutions, and communities by synthesizing her professional experience in the financial and technology industries and nonprofit sector.

She is Director of Communities at thegroupy.com, a social venture that provides software that increases organizational efficiencies of schools and other nonprofits. She is also a Research Affiliate at Institute for the Future, where her interests are in the areas of intangible asset valuation, corporate social responsibility, and other areas of financial

and economic reform that are directly applicable to measurement and decision-making issues facing nonprofit and for-profit entities.

Jessica holds an MS in Materials Science in the area of nanotechnology and an MBA in Strategic Management and Organization, both from the University of Minnesota, and a BA in Physics from UC Berkeley, and resides in the San Francisco Bay Area of California. She blogs at "Solvation".

#### **MAXIMILIAN MARTIN**

##### **Global Head of Philanthropy Services | UBS**

Maximilian serves as a Visiting Professor at the University of Geneva and lectures at the University of St. Gallen. Previous engagements include serving as Head of Research at the Schwab Foundation for Social Entrepreneurship, Senior Consultant with McKinsey & Company, instructor at Harvard's Economics Department, and Fellow at the Center for Public Leadership at the John F. Kennedy School of Government.

His research focuses on the relationship between globalization, social entrepreneurship and philanthropy, and emerging cross-sector value creation opportunities in this space. In 2003, he developed the first university course on social entrepreneurship in Europe for the University of Geneva and the Schwab Foundation for Social Entrepreneurship. In 2003-2004, he conceptualized and then set up the UBS Philanthropy Services model and the UBS Philanthropy Forum.

Maximilian holds a Master in Anthropology from Indiana University, a Master in Public Administration from Harvard University, and a PhD in Economic Anthropology from the University of Hamburg, Germany.

#### **CYNTHIA MASSARSKY**

##### **Vice President | Growth Philanthropy Network**

Cynthia has a 35-year history in the nonprofit sector, where she has been at the forefront of the social entrepreneurship movement. She is currently Vice President at Growth Philanthropy Network, a nonprofit

that attracts and packages growth capital and other resources to take outstanding organizations and programs to regional and national scale.

Most recently, Cynthia directed the Yale/Goldman Sachs Business Plan Competition, which she created for the Pew Charitable Trusts, Goldman Sachs Foundation, and Yale School of Management. Cynthia is also Principal of CWM Marketing Group, a consulting firm specializing in marketing, new business development, and evaluation services for nonprofits, foundations, and corporate philanthropy. Previously she held positions at Scholastic, the Ms Foundation, New Ventures and The Foundation Center. She has a number of publications to her credit including *Generating and Sustaining Nonprofit Earned Income: A Guide to Successful Enterprise Strategies* (Jossey-Bass).

Cynthia received a bachelor's degree from Simmons College and an M.B.A. from Cornell University.

#### **CHRIS MCCORMICK**

##### **Co-founder | GeoOptics**

Chris is founder of Broad Reach Engineering and co-founder of GeoOptics; both companies can claim more successful high-technology satellite hardware and flight control software flying in space today than all others.

Chris' companies deliver atmospheric data that has already proven dramatically better at forecasting hurricanes and typhoons; he currently travels the globe developing partnerships with governments, industry, social capitalists and all interested in saving lives from severe weather and global climate change.

#### **TRICIA MCKAY**

##### **Executive Director | Medina Foundation**

Tricia oversees all activities of the Medina Foundation, a family foundation located in Seattle, whose giving areas include homelessness,

at-risk youth and families and educational assistance to kids at risk of academic failure.

Tricia formerly was the director of the Craig and Susan McCaw Foundation. Tricia spent two years volunteer teaching first-year journalism students history and political science in a small college in Tanzania in East Africa. Prior to that, she was Director of Government Affairs for Washington Natural Gas, following a stint as a legislative assistant to U.S. Senator Daniel J. Evans in Washington, D.C.

Tricia currently serves on a number of boards and committees, including Social Venture Partners, Team Read, Thrive by Five, the University of Washington Daniel J. Evans School of Public Affairs Visiting Committee, Village Reach Advisory Board and the Governor's Task Force for Homeowner Security. She also completed an executive program in Philanthropy Leadership at Stanford University and a year-long program in philanthropy with a small cohort through The Philanthropy Workshop - West.

#### **JEFF MENDELSON**

##### **Founder and President | New Leaf Paper**

Jeff is the founder and president of New Leaf Paper, a company with the mission of driving a fundamental shift toward sustainability in the paper industry. He envisions a complete redesign of the paper industry to incorporate the principles of sustainability and he is a frequent public speaker on this topic.

Jeff leads New Leaf Paper's product innovation, creating a wide selection of market leading environmental papers that fit this vision. Since it was founded in 1998, New Leaf Paper has seen real change in the marketplace through its efforts and has inspired some of the largest paper companies in the world to pay attention to environmental concerns. Jeff's interest in socially responsible business transcends the goals of New Leaf Paper and he actively works to support the growth of the socially responsible business community.

# SOCAPO8 SPEAKERS {CONTINUED}

## JERRY MICHALSKI

**Independent Consultant | Sociate**

From 1987 to 1998, Jerry was a technology analyst, focusing not on quarterly earnings but rather on which technologies would be useful and which would be distractions, what trends and forces create new potential, and where all these forces might take us over a 20-year timeframe. For the last five years of that period, Jerry was the Managing Editor of Esther Dyson's monthly tech newsletter Release 1.0, as well as co-host of her annual conference, PC Forum.

Since 1998, Jerry has been an independent consultant, doing business as Sociate, a name he coined because he is skilled at associating ideas and people, and also because he believes that the social changes that we are going through as a result of all the new connectivity (e.g., Internet, cell phones, inexpensive cameras, podcasting) will be more profound than the structural and economic changes we have already seen.

## DANNY MOLDOVAN

**Facilitator | Connection Concierge for SOCAPO8**

Danny is currently developing Assetmap.org into a web-based platform to help individuals and organizations organize, visualize, and share information about the assets they can bring to bear to accomplish common goals. He also serves on the Board of Directors for Northwestern University's Center for Global Engagement - an international program design center which helps students move beyond "good intentions" to be a part of responsible, sustainable global problem solving.

He was previously on the Board of Directors for Northwestern's Hillel and is currently advising several projects to improve how cultural institutions, faith-based communities, and foundations utilize social technology. Prior to this work, Danny was the Director of Finance and Development for a youth media initiative called The Passenger - a magazine project and nonprofit organization designed to bring today's young people together around common questions of generational

identity and shared potential. Danny also has a background in New York City and State politics. He is facilitating the Connection Concierge program at Social Capital Markets 2008.

## DAVID MURPHY

**President and CEO | Better World Books**

David received his Bachelor of Arts in Economics, with High Honors, from the University of Notre Dame. He also received his MBA from the Amos Tuck School of Business at Dartmouth College. David worked 20+ years in corporate finance, operations and mergers and acquisitions with firms such as International Paper Company, The First Boston Corporation, and Hutchinson SA (a multi-billion dollar French subsidiary of the Total Energy Group). He has started several companies as well as served as CFO, COO, and CEO for both privately held and publicly traded firms in the manufacturing, health care services and technology sectors.

Additionally, he has served on both corporate and nonprofit boards. David is currently President and CEO of Better World Books. He is very active in the annual Social Venture Business Plan Competition at the University of Notre Dame's Gigot Center of Entrepreneurship and serves as an Advisory Board Member for Books for Africa and Globe Funder.

## ERIC NEE

**Managing Editor | Stanford Social Innovation Review**

Eric is the managing editor of the quarterly magazine Stanford Social Innovation Review and co-host of the podcast channel Social Innovation Conversations. He also serves as a judge for the Faculty Pioneer Award in Social Entrepreneurship Education sponsored by the Aspen Institute and Ashoka, and for the SVN Innovation Awards sponsored by the Social Venture Network.

Before joining Stanford, Eric covered Silicon Valley for more than 20 years. He was a senior writer for Fortune magazine in the Palo Alto, California bureau, and helped Time Inc. launch eCompany Now, later

known as Business 2.0, where he was executive editor. Before joining Fortune, he launched Forbes magazine's Silicon Valley bureau, where he was bureau manager.

Eric also served as editor-in-chief of Upside magazine for close to five years. He earned a B.A. in American Studies from the University of California, Santa Cruz, and a M.S.J. from the Medill School of Journalism at Northwestern University. He lives in Palo Alto with his wife Tekla, a senior editor at IEEE Spectrum magazine, and their three children.

## PHIL OLDHAM

**Regional Director | Mercy Corps**

Phil is currently the Mercy Corps Regional Director for West and Central Africa, based in Accra, Ghana. He manages programs in the Democratic Republic of Congo (DRC), the Central African Republic (CAR), Liberia and Niger.

He has over 15 years of experience in international relief and development and has previously served in Russia, Croatia, Bosnia, Albania, Eritrea, and the DRC. He holds a BA in Soviet Studies and speaks Russian, Serbo-Croatian, and French.

## SARA OLSEN

**Founding Partner | Social Venture Technology Group**

Sara is the founding partner of Social Venture Technology Group (SVT), which works with clients to measure, manage and communicate their social and environmental impact. SVT provides impact management consulting, investment advisory services, and information systems design and implementation. A core SVT strength is the use of affordable technology to make the acquisition of impact data orders of magnitude easier, and to present impact in intuitive ways that inform action.

Previously Sara ran a design company staffed by inner-city teens for Shorebank Corporation and taught public high school in Mississippi.

Her current advisory board roles include xigi.net, Environmental Capital Group, and Calvert Foundation's Social Enterprise Fund. She co-founded the Global Social Venture Competition in 1999, and holds an MBA from UC Berkeley, an MASW from the University of Chicago, and a BA from Dartmouth College. She lives in the San Francisco Bay Area where she plans to start a family soon with her partner, Arzhang, an engineer and beekeeper.

#### **TIM O'SHEA**

**Founder and Chairman | CleanFish, Inc.**

Tim likes market practices ahead of the curve. He served as President for a leading alternative futures center during the 70's. Concurrently, Tim was Director of Policy for the Council on the Environment of New York City, where he sensed the role of business to effect positive change was practically untapped.

Years of study and practice as a strategic consultant helped Tim integrate his public policy and community work with business pragmatics. Time spent with Sweden's The Natural Step revitalized Tim's sense that the old culture of business against environment could be changed.

In 2003, after reading horrific reports about industrial-scale farmed fish and exhausted wild habitats, he set off to explore solutions to the seafood crisis. He discovered artisan stewards, both of wild caught and cultivated fish, which led him to establish CleanFish. CleanFish™ is committed to accelerate pragmatic, positive eco-economic change with fish you can trust™.

#### **GEORGE OVERHOLSER**

**Founder, Managing Director | Nonprofit Finance Fund Capital Partners**

George is an expert in helping companies grow. In addition to his role as founder and Managing Director of NFF Capital Partners, he was founder of North Hill Ventures, and a member of Capital One Financial Corporation's original management team.

During his seven-year tenure as head of strategy/new business development for Capital One, earnings grew by more than ten-fold. Presently, he works full-time to help form a capital market that serves the nonprofit sector. Additionally, he serves as a board director for VistaPrint Inc.

Prior to 1994, George was a principal at Mercer Management Consulting, Inc., where he participated in a wide range of strategy consulting assignments. He earned a B.S. in Physics from Harvard University and an M.B.A. from the Stanford Graduate School of Business.

#### **DAN PALLOTTA**

**Founder | Pallotta TeamWorks**

Dan created the for-profit company that invented the AIDS Rides and Breast Cancer 3-Days, and changed the fundamental paradigm for special event fundraising in the United States. 182,000 people participated in the events, which grossed \$561 million and netted \$305 million in nine years - more money raised more quickly for these causes than any private event operation in history.

The company had 350 full-time employees in 16 U.S. offices and was the subject of a 2002 Harvard Business School case study. In 2002 alone the company's events raised \$169 million. The company's methods are now used by dozens of charities all over the world to raise tens of millions of dollars each year.

Dan is the author of "Uncharitable: How Restraints on Nonprofits Undermine Their Potential," which will be released in November. He lives in Los Angeles with his partner and their three children.

#### **CARL PALMER**

**Principal and Co-founder | Beartooth Capital Partners**

Carl co-founded Beartooth Capital Partners, a private equity fund that invests in ranchland to generate strong risk-adjusted financial returns and real conservation results. Previously, Carl founded and directed

a predecessor to Beartooth that made private equity real estate investments with conservation outcomes, served as chief executive of a land trust and environmental education center in Utah and lived and worked in Grand Teton National Park.

Carl earned bachelors degrees in environmental and architectural studies with honors from Brown University and an M.B.A and certificate in public management from Stanford University Graduate School of Business where he served as president of the Public Management Program.

#### **KOJO MALCOLM PARRIS**

**CEO | Social Private Equity South Africa**

Kojo is Head of the Colloquium for Social Entrepreneurs @ GIBS and Founding CEO of Social Private Equity South Africa, a social investment fund that uses classic private equity methodologies to aggregate and deploy capital and corporate mentorship to replicable, high social value add entities.

He was an investment banker with NM Rothschilds, Merchant Bank of Central Africa & African Banking Corporation Holdings, oversaw investment portfolios at TA Holdings and Takura Ventures Fund (Actis' predecessor fund) in Zimbabwe, and worked in operational management for Booker Tate in Papua New Guinea, Australia, Kenya, and London.

Kojo was born in Guyana for whom he is the Honorary Consul to South Africa, won the Cambridge Commonwealth scholarship where he read for an MA in Engineering (Manufacturing). Subsequently qualifying with Touche Ross (renamed Deloitte) in London where he worked also as a management consultant. He also completed the first stage of the CFAs.

#### **RYAN PEDERSON**

**Team Member | Connection Concierge for SOCAP08**

Ryan is a Co-Director for the Center for Global Engagement (CGE) at

# SOCAPO8 SPEAKERS {CONTINUED}

Northwestern University. The CGE works to develop a generation of students committed to social justice through designing transformative global service immersions and providing training for young social entrepreneurs from NU and around the world.

As a senior at Northwestern, Ryan co-directed the Global Engagement Summit (GES), a weeklong training program for 55 student fellows from 39 countries that seeks to build the capacity of its fellows to enact responsible and sustainable change. Ryan's geographic focus in college was Uganda, where he spent three summers working on community development projects.

This summer he co-coordinated a team of 20 students working on four projects throughout country. Next fall Ryan will start work as an associate at the Chicago office of the Boston Consulting Group before moving on to pursue passions in international development and ministry. Ryan is a member of the Connection Concierge team at Social Capital Markets 2008.

## JO-ANN POHL

### Chief Financial Officer | Teba Bank

Teba Bank, an authorised financial services provider specialising in basic and micro-financial services, appointed Jo-Ann to its Board as Chief Financial Officer in June 2007. Prior to her appointment, she was at Barclays Africa where she began as a Corporate Merchant Banking and Treasury Performance Consultant, then as a Regional Financial Controller, before being promoted to Head of Finance.

Jo is passionate about people and this is evident in her involvement outside of her professional commitments. She has been elected as a director on the CAF (Charities Aid Foundation) Southern Africa board, is a participating member of the Institute of Directors, a member elected trustee of the Chamber of Mines Retirement Fund, a mentor on the Black Entrepreneurship Initiative, and a Breast Cancer Counsellor (amongst others).

She joined Teba Bank because she'd like to play a significant role in making a difference as she contributes to building a bank that will serve our market with passion, pride and excellence.

## PAUL POLAK

### Founder | International Development Enterprises

As founder of Colorado-based nonprofit International Development enterprises (IDe), Paul is dedicated to developing practical solutions that attack poverty at its roots.

For the past 25 years, he has worked with thousands of farmers in countries around the world - including Bangladesh, India, Cambodia, Ethiopia, Myanmar, Nepal, Vietnam, Zambia and Zimbabwe - to help design and produce low-cost, income-generating products that have already moved 17 million people out of poverty.

Paul's ability to respond with innovative solutions -such as the \$25 treadle pump and small farm drip-irrigation systems starting at \$3- helped IDe increase poor farmers' net income by \$288 million annually

Last year, IDe received a \$14 million grant from the Bill & Melinda Gates foundation. In 2004, Paul received Ernst & Young's "entrepreneur of the year" award in the social responsibility category. And, Paul was named one of the Scientific American "top 50" for his leadership in agriculture policy in 2003.

## JAMES POLAN

### Vice President | Overseas Private Investment Corporation

Jim is Vice President of the Small and Medium Enterprise Finance Department at the Overseas Private Investment Corporation (OPIC). The SME Finance Department administers OPIC SME direct lending programs sponsored by US companies and financial institutions.

From 2005 Jim introduced, designed and implemented exceptionally

innovative, developmental, and award-winning products including those involving MSME, renewable/clean tech energy and low-income housing finance resulting in a multi-billion dollar increase in assets and significant economic and social developmental benefits.

In 2003 Jim led the effort to create OPIC's Small Business Center (SBC). The center was established to provide greater access to capital for small U.S. companies investing in developing countries. The SBC lending programs reduces the time and transaction costs typically associated with project financings.

Prior to assuming the role of Vice President Jim has led project teams to project finance transaction closings throughout the world, covering multiple sectors and franchising representing tens of Billion Dollars in foreign direct investment in over 150 developing countries.

## RAÚL POMARES

### Vice President | Guggenheim Partners

Raúl serves as a Portfolio Manager for clients of Guggenheim Wealth Management. In addition, Raúl specializes in global Social, Mission & Sustainability Investment (SMSI) programs for foundations and clients seeking social impact from their portfolio.

Prior to joining Guggenheim, Raúl was Co-founder and Director of Client Services for a boutique wealth management firm that specialized in comprehensive estate planning and investment advisory services for private family offices and individuals. Prior to that, he was a Financial Planner and Investment Advisor with AXA Advisors.

Earlier in his career, Raúl gained experience as an International Private Banker for Bank of America and completed various international consulting projects for private investors. He received his degree in International Business Management from the University of San Francisco.

**BRAD PRESNER****Project Manager | Acumen Fund**

Brad works for Acumen Fund and is the Project Manager for the PDMS (Portfolio Data Management System) social metrics platform. Brad joined Acumen after working with them on the PDMS project as a part of Google.org.

At Google.org, he led M&E efforts, helping to build a culture of rigorous, thoughtful, analytical impact assessment, and worked with the portfolio teams to create and track success metrics for their initiatives.

Prior to Google.org, Brad had a business background, most recently working at Google Inc. for close to 5 years, where he began, and later helped manage, the Business Analytics team in Google's Online Sales and Operations department. He began his career as a Mechanical Engineer at a Silicon Valley hardware company. He holds a BS degree in Mechanical Engineering from Stanford University.

**VINEET RAI****Founder and CEO | Aavishkaar**

Vineet has over 13 years of experience in leading innovative interventions in development sector and brings crucial hands on understanding of Social Development, Venture Capital, Micro Enterprises and Microfinance Investments.

Vineet founded Aavishkaar Venture Management Services, a fund advisory company that manages Aavishkaar India Micro Venture Capital Fund and Aavishkaar-Goodwell Microfinance Development Company. Vineet is also a Partner at Goodwell BV, Netherlands and a Managing Partner with BYST Growth Fund.

Vineet co-founded Intellectap, an emerging social investment advisory firm that is using knowledge to lead social capital to deserving social or rural entrepreneurs. As the Co-founder and Director, Vineet helps in defining the vision for Intellectap and plays an active role on its board.

On behalf of Aavishkaar, Vineet has received the World Business Award for the year 2006 and also the Ford Foundation SME & Poverty Award. He has been awarded Ashoka Fellowship in recognition of his contribution to the field of Social Entrepreneurship and Life Membership of XLRI Alumni Association.

**BEN RATTRAY****CEO | Change.org**

Ben is the founder and CEO of Change.org, an online network that connects and empowers donors, activists, and nonprofits around the world.

He was previously a political consultant and co-founder of GFS, a social entrepreneurship venture that provides software to help nonprofits automate the federal grant application process. Ben speaks about how organizations and activists can use the Web to advance social change. He is a graduate of Stanford and the London School of Economics.

**TESS REYNOLDS****CEO | New Door Ventures**

Tess is the CEO of New Door Ventures, a San Francisco nonprofit that helps at-risk youth get ready for work and life through jobs, job-readiness training and supportive communities. New Door operates two social enterprises as job-training centers for youth: Ashbury Images, a national apparel printing business, and Pedal Revolution, a bicycle sales and repair shop in the Mission District.

Previously, Tess worked in the consumer goods and computer technology industries. She co-created Harvard Graphics, which preceded PowerPoint as leader of the presentation graphics category. She has worked as a business unit general manager, a VP of marketing, and principal of her own management consulting firm. Tess has served on the board of directors and advisory committees of several community-based nonprofits. She earned her B.A. in Economics from the Ateneo de Manila University and her M.B.A. from Santa Clara University.

**PAUL RICE****President & CEO | TransFair USA**

Paul is the President and CEO of TransFair USA, the only Fair Trade certification organization in the U.S. today. Since launching the Fair Trade Certified label for coffee ten years ago, Paul has helped establish Fair Trade as one of the fastest growing segments of the food industry.

Paul has received numerous prestigious international awards for his pioneering work as a social entrepreneur in the Fair Trade movement, including: the Ashoka Fellowship, the Klaus Schwab Foundation Award for Social Entrepreneurship, and the Skoll Award for Social Entrepreneurship. Paul holds an MBA from the Haas School of Business at UC Berkeley.

**ÁLVARO RODRÍGUEZ****Co-founder and Managing Partner | IGNIA Partners, LLC**

In 2005 Álvaro was named Young Global Leader by the World Economic Forum. In 2008 he was invited as a member of the Forum's Global Agenda Council.

He is co-founder of IGNIA Partners, a venture capital social investment firm based in Monterrey, Mexico that is focused on investing in and developing commercial enterprises serving the base of the socio-economic pyramid.

He is Chair of the Board of ACCION International, a Boston, Massachusetts based nonprofit and a global pioneer of microfinance and worldwide leading development organization in the field.

He is a member of the Young President's Organization, Monterrey chapter. In addition, the magazine América Economía recently named him as one of 10 "Leaders of the Future" in Latin America. Álvaro is a Pan American (1991) and Central American (1990) rowing medalist and was eighth in the World University Games (1989).

# SOCAPO8 SPEAKERS {CONTINUED}

## EDOUARD ROLLET

**Co-founder & COO | Alter Eco**

Edouard is the co-founder & Chief Operating Officer of Alter Eco, a pioneering Fair Trade brand distributed in over 1,500 stores across the US. A passionate advocate for social justice, child protection, development, and issues that pertain to the inequalities between the North and the South, Edouard has traveled extensively in developing countries and has been involved in several development organizations in South East Asia. He also consulted for the communications department of the UNICEF in Dakar, Senegal.

Prior to launching ALTER ECO in the U.S., Edouard was a Senior Trade Attaché at the French Embassy in New York. Edouard holds an MBA from The European Institute of Business and a MA in Mass Communications from the University of Florida. Born in Lyon, France, he has been a U.S. resident for over 10 years. Edouard lives in San Francisco and is married to Ilse Keijzer, founder of Alter Eco Pacific (Australia/New Zealand).

## WILLIAM ROSENZWEIG

**Managing Director | Physic Ventures**

William is co-founder and Managing Director of Physic Ventures, LP, a venture capital fund focused on consumer-driven health and sustainable living.

Previously, he was co-founder and Managing Partner of Great Spirit Ventures, a \$20 million venture fund, and co-founder and Chief Executive Officer of Brand New Brands, a \$15 million functional food accelerator fund, which has successfully commercialized four new companies.

William was co-founder and Chief Executive Officer of The Republic of Tea, Senior VP of Odwalla, VP of Nakamichi, CEO of Hambrecht Vineyards and Wineries, and Chairman of Winetasting.com. He co-founded Venture Strategy Partners, where he invested in brand-driven

businesses including Stonyfield Farms.

William was on the faculty at the University of California, Berkeley for 7 years, teaching the MBA course in Social Entrepreneurship.

## JIM ROTH

**Partner | Leapfrog Investments**

Jim is a leading expert in the global microinsurance sector. Formerly, he was Vice President of The Microinsurance Centre, ILO Chief Technical Advisor on microinsurance in India, and consultant to multinational insurance companies such as AIG and Allianz and banks such as KFW and ADB.

Jim has sourced and negotiated deals with microinsurance distribution networks; he has developed partnerships between commercial insurers and MFIs/NGOs; and he has trained over 50 leaders of MFIs to sell microinsurance. He led the 100 Country Landscape Report on Microinsurance and co-authored the manual on Making Microinsurance Work for MFIs. He holds a PhD on microfinance from Cambridge.

## CHRISTIAN SCHATTENMANN

**Director of Finance | Bamboo Finance**

Christian leads the administrative and operational management of Bamboo Finance. Before joining Bamboo Finance, Christian was working as Director Finance at a German based Semiconductor Company. Prior to that, he was Investment Manager at the Venture Capital Group Pari.

Over the last 7 years he was directly involved - both on the buy and sell side - in structuring and implementing a wide range of financing instruments. Previously Christian has worked for an international law firm with assignments in Munich, London and Buenos Aires.

In 2003, he took a sabbatical to establish The Pangea Project, a nonprofit organization promoting sustainable tourism structures in

Central America. In the process he developed on-the-ground expertise in working with indigenous communities in Panama. Christian holds an MBA from IE Business School in Madrid, a Master of Law degree from Université Panthéon-Assas in Paris and is a fully qualified lawyer in Germany. He is fluent in English, French, German and Spanish.

## PATRICE SCHNEIDER

**Director of Development | Media Development Loan Fund**

A press freedom enthusiast, Patrice started his publishing career as a journalist reporting from conflicts in Central Asia at the end of the 1980s. Before being involved in media development, he held the responsibilities of Managing Director of Netscape Europe overseeing its European activities.

In 1998, before joining Netscape, Patrice was a Senior Adviser for the World Economic Forum (The Davos summit). Prior to this mission, he was Deputy Managing Director at Hachette Filipacchi Medias: the leading French publishing group and owner of ELLE, PREMIERE and other internationally renowned magazines. Patrice has also worked as a Director at the World Association of Newspapers in Paris. He is a Canadian citizen and lives in Zürich.

## ROB SCHNEIDER

**Senior Official | USAID**

Rob is a senior private sector alliance builder as part of the Global Development Alliance within the U.S. Agency for International Development. He is responsible for coordinating the Agency's corporate outreach efforts, and managing the Global Frameworks that the agency has with multi-national corporate partners.

Prior to working with the Global Development Alliance, Rob provided technical assistance to USAID's overseas missions on urban issues including housing and local economic development. He has an MBA and Master's of Urban Planning from the University of Michigan.

### **JIM SCHORR**

#### **Lecturer | Haas School of Business at UC Berkeley**

Jim's experience at the nexus of business & society includes a number of roles over the past 15 years. As an MBA student he co-founded Net Impact, an organization which has since enabled 25,000+ MBAs at more than 150 graduate business schools on 5 continents to integrate social & environmental priorities into their business education and careers. Jim was CEO and led the growth of Juma Ventures, widely respected as one of the leading social enterprises in the world.

He now develops and teaches coursework on Social Enterprise & Entrepreneurship at the Center for Responsible Business, Haas School of Business. He also serves as Board Chair at Net Impact and on the Board of Directors at the Social Enterprise Alliance and Global Social Venture Competition. Jim has published in the Stanford Social Innovation Review and been a featured speaker at numerous conferences and events, including a keynote address at the most recent World Forum on Social Enterprise.

### **ARJAN SCHÜTTE**

#### **Associate Director | The Center for Financial Services Innovation**

As an Associate Director at, Arjan manages the Center's investment and grant programs and oversees the Business Match event series.

Prior to joining CFSI in 2004, he led an array of enterprise technology development projects for clients such as Bank of America, Intel, and Target. In 2000, he founded DoTheGood, Inc., a for-profit philanthropy management company that raised funds for almost 5,000 nonprofit organizations in four years.

Arjan received an MS from MIT's Media Laboratory, where he was an Interval Fellow. Here, he worked with companies such as Philips, Kodak, Sony and The Tribune Company, researching next generation technologies in interactive cinema, tangible media, and epistemology and learning.

A pioneer in interactive learning technology, he produced one of the first interactive higher education CD-ROMs in 1993 and led a team which produced a series of award-winning titles in various subjects for the K-12 market.

### **WES SELKE, CFA**

#### **Investment Manager | Good Capital**

Wes leads investment management for the Social Enterprise Expansion Fund. He is also a Board Observer for Better World Books and Adina for Life. He has eight years of investment management and transaction experience in the financial services industry and is a Chartered Financial Analyst (CFA). He spent two years as an Equity Research Associate at William Blair & Company. Before William Blair, Wes spent four years with Ernst & Young Corporate Finance.

Wes is passionate about international development and has worked with a variety of organizations that are seeking to alleviate poverty in the developing world including Foundation for His Ministry, which operates three orphanages in Mexico, and the Wildlife Conservation Society in Zambia. He is also a Board Advisor for NamasteDirect, a nonprofit organization that supports microfinance in Central America.

Wes earned an MBA from the Haas School of Business at the University of California, Berkeley and a BBA from the University of Michigan with an emphasis in Finance and Accounting.

### **DON SHAFFER**

#### **President and CEO | RSF Social Finance**

Don is President and CEO of RSF Social Finance, a nonprofit financial services organization inspired by the work of Rudolf Steiner. Through its lending, giving, and investing services, RSF has made over \$145 million in loans and over \$65 million in grants since 1984 to social enterprises in the areas of Food & Agriculture, Education & the Arts, and Ecological Stewardship.

Prior to joining RSF, Don served as Executive Director of the Business Alliance for Local Living Economies (BALLE), as well as Interim Executive Director of Investors' Circle. He remains a Trustee of BALLE, in addition to being on the Boards of Social Venture Network and Comet Skateboards.

### **PREMAL SHAH**

#### **President | Kiva.org**

Premal is President of Kiva.org – a website that connects Internet users with developing world entrepreneurs in need of a small loan. Called one of the 50 Best Websites by Time Magazine, Kiva.org raises \$1 million in \$25 increments every 10 days – and has connected over 300,000 Internet lenders to 50,000 entrepreneurs in 45 developing countries in its first 3 years.

Prior to Kiva, Premal was a Principal Product Manager at PayPal (an eBay company) where he spent 6 years building out the global payments service. Premal began his career as a management consultant in New York.

His work as a social entrepreneur has been featured in media ranging from Fortune Magazine to Al Jazeera, with speaking invitations ranging from college campuses to the Clinton Global Initiative. Premal graduated with a B.A. in Economics from Stanford University.

### **TOM SHERIDAN**

#### **Founder and President | The Sheridan Group**

Tom began his career as a social worker opening group homes for the developmentally disabled in New York. He is well known as the influential leader of the nation's first AIDS lobby.

In 1991, Tom founded The Sheridan Group, whose mission is to "help the good do better", and which has become the go-to firm in the nation's capital for nonprofits, social entrepreneurs and other agents of change.

# SOCAP08 SPEAKERS {CONTINUED}

A veteran of the Mondale-Ferraro presidential campaign, Tom is a seasoned political and policy expert who uses his knowledge of the legislative process to help organizations achieve positive social change on a global scale. He has created a unique approach to advocacy that makes him a sought-after ally of progressive organizations determined to challenge the status quo.

He has been a volunteer for numerous community charities, participating in seven AIDS Life Cycles and pedaling more than 3,000 miles. He holds a Bachelor's degree from Dominican College and a Masters degree in Social Work from The Catholic University of America.

Tom and his partner, Vince Walsh, live in Washington DC with their golden retriever Seamus and their golden doodle Phina.

## DAN SHINE

**President | 50x15 Foundation**

Dan is president of the 50x15 Foundation and vice president of the 50x15 Initiative at AMD. 50x15 is a global, partner-based initiative to develop new technology and solutions to achieve the goal of delivering affordable Internet access and computing capability for 50 percent of the world's population by the year 2015.

As a leader of AMD's global 50x15 team, Dan works with international partners to help bring digital inclusion to underserved regions around the globe. In particular, 50x15 focuses on six key areas identified by the World Economic Forum (WEF) that make up the "Digital Inclusion Ecosystem" – critical factors that, when combined, create the best solutions for digital inclusion.

Dan's commitment to digital inclusion has also made him an active participant in this movement with the World Economic Forum.

## JOE SIBILIA

**Founder and CEO | Meadowbrook Lane Capital**

Joe is the husband of Claire Sullivan and father of three daughters: Kristen, Kendra and Kayla, and resident of the Earth. He is founder and current CEO of Meadowbrook Lane Capital, a self-described socially responsible/sustainable investment bank specializing in mission driven succession. Meadowbrook Lane recently purchased the controlling interest in CSRwire.

Joe is one of the incorporators, founders, and Board Member Emeritus of the Bank of Western Massachusetts. He is an underwriter and leader of the anti-casino effort for the State of Massachusetts.

Joe is also a founder of the Gasoline Alley Foundation, a 501(c)3 corporation designed to teach inner-city and/or underprivileged persons to be successful entrepreneurs using socially responsible/sustainable business practices while revitalizing inner city neighborhoods.

He is also a Board member of the Social Venture Network, Springfield Technical Community College, The Security Group among others. He is working on a book called What I Learned Hanging at the Corner, lessons from a street kid turned entrepreneur.

## D. WAYNE SILBY

**Founding Chair | Calvert Funds**

Wayne is Founding Chair of the Calvert Funds, a \$15 billion investment management group in Bethesda, Maryland, noted for their leadership in the area of socially responsible investment. Though he is no longer active in the most of the day-to-day business of Calvert, he serves as President of Calvert Social Investment Fund and supervises its private equity activities.

He also works as Co-Chair with Calvert Foundation, a \$200m investment intermediary that directs monies into communities. He was a co-founder of the Social Venture Network, a group of socially oriented

entrepreneurs and investors, and of Calvert Social Venture Partners, one of the first socially oriented venture capital funds.

He is Chairman of Syntao, Ltd., a Beijing company consulting on Corporate Social Responsibility. He co-founded the Emerging Europe Fund for Sustainable Investment and The ICE Organisation (UK) which focuses on carbon footprint. He chairs the China Committee of Grameen Foundation USA, on whose board he also serves, and serves on the board of the Grameen Technology Council, which addresses issues of the digital divide.

## CHRISTINE EIBS SINGER

**Co-founder and Deputy Executive Director | E+Co**

Christine is a co-founder and Deputy Executive Director of E+Co, an investment company for clean energy businesses in Africa, Asia and Latin America that has invested in 173 local businesses now providing energy to 4 million people, while offsetting 3.5 million tons of carbon per year.

With expertise in public-private partnerships, her responsibilities include partner and investor relations, development and strategic planning. Christine spent 10 years at the Port Authority of New York and New Jersey, managing the World Trade Institute, an international business education center training 6000 global professionals/year. A graduate of Douglass College and the Eagleton Institute of Politics, Rutgers University, she is the recipient of the 2007 Woman of Inspiration Award from Fairleigh Dickinson University.

## KOANN VIKOREN SKRZYNIARZ

**Founder and President | Sustainable Life Media**

KoAnn is founder and President of Sustainable Life Media (SLM), an integrated business media franchise focused on helping companies create economic value via innovation for sustainability.

Formerly Senior Vice President with a multi-national trade media

company, her involvement with business and the environment dates back to the mid-1980s when she launched international conferences on improving log utilization, reducing Waste Paper, and eliminating ozone-layer destroying chemicals (CFCs or chlorofluorocarbons). For 10 years she supported emerging technology markets by establishing neutral media platforms to bring new learning communities and value chains together.

Since 2003, she has devoted her full attention to the emerging field of sustainable business. SLM currently publishes 7 sustainable business newsletters and produces a score of learning events including the widely respected “Sustainable Brands Conference and SB International.” KoAnn lives with her entrepreneurial husband, Steve and their two sons, Josh and Jake on the San Francisco Peninsula.

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#### **SCOTT SMITH**

**Partner | Hanson Bridgett LLP**

Scott is a Partner with the San Francisco law firm of Hanson Bridgett LLP. His practice emphasizes general business, corporate and tax law. Scott also has significant experience counseling corporations, partnerships, nonprofits and entrepreneurs in connection with all aspects and phases of their business and operations.

In addition to working with institutional investors, Scott has sat on the other side of the table and represented venture capital, private equity, real estate and hedge funds in connection with fund formations and their investments. Scott has acted as fund formation and investment counsel to Good Capital, TBL Capital and Patient Capital Collaborative.

Scott has done significant work with nonprofits and social ventures in a variety of areas, counseling clients on everything from choice of entity and hybrid structures to intellectual property issues and financings. Scott’s clients in the social venture area include, New Resource Bank, Investors Circle, Barefoot Motors, PlanetRead, Chocolate Dividends, Book Box, MobileMetrix, Helio Micro Utility and Kiva Microfunds.

#### **SAHBA SOBHANI**

**Program Manager | United Nations Development Programme**

Sahba is the program manager for the Growing Inclusive Markets Initiative of the United Nations Development Programme’s Partnership Bureau Private Sector Division. This UNDP-led multi-stakeholder initiative aims to raise awareness and disseminate information on how businesses can contribute to human development and to the Millennium Development Goals. Sahba was the lead author of its first report “Creating Value for All: Strategies for Doing Business with the Poor”.

Previously, Sahba managed two key private sector initiatives in the executive office of the former Administrator of UNDP, Lord Malloch Brown. He is co-author of “Unleashing Entrepreneurship,” the seminal report of the Private Sector Commission produced at the request of then-UN Secretary General Kofi Annan.

Sahba has also worked in the private sector at Idealab in Palo Alto and Newscom Limited in Singapore. He is a graduate of Yale University.

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#### **ELISABETH “LISSA” SOEP, PhD**

**Research Director and Senior Producer | Youth Radio**

Lissa is Research Director and Senior Producer at Youth Radio, a youth-driven production company based in Oakland, California, with bureaus and partners in every region of the United States and around the world. The Youth Radio stories that she has produced for National Public Radio and other outlets have been awarded with top honors including the Edward R. Murrow, George Foster Peabody, and Gracie Allen Awards.

Lissa holds a PhD from Stanford University and has published widely about youth, media culture, and social change, including articles in the Harvard Educational Review and National Civic Review; the co-edited volume, Youthscape (University of Pennsylvania Press, with Sunaina Maira), and a forthcoming book, Drop that Knowledge (University of

California Press, with Vivian Chavez). Lissa serves on the Board of Directors of the nation’s premiere youth poetry organization, Youth Speaks (HBO series airing 2009) and teaches graduate courses most recently at University of California, Berkeley.

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#### **MARC SPENCER, ED.D**

**Chief Executive Officer | Juma**

Marc has 15 years of experience in the nonprofit management sector specializing in fund and program development; contracts and compliance; quality management; and legislative affairs.

His accomplishments include the development of a San Francisco African American private school and the design and directorship of the nation’s first Upward Bound Visual and Performing Arts program. Marc recently served as the Business Development Director for Walden House Inc. Since taking leadership at Juma, Marc has successfully scaled and replicated the Juma model nationwide.

Today Marc is a member of the Aspen Institute’s Youth Entrepreneurship Strategy Group, advisory board member of the National Youth Employment Coalition, Fellow at the Full Circle Fund, member of the Social Enterprise Alliance, and advisory board member of American Forward. Marc holds a bachelor’s degree in cultural anthropology from the University of California, Los Angeles, as well as master’s and doctorate degrees in Education from the University of San Francisco. He lives in West Oakland, California with his wife and two sons.

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#### **SEAN STANNARD-STOCKTON**

**Principal | Ensemble Capital Management**

As a principal at Ensemble Capital Management, Sean is director of tactical philanthropy and manages client portfolios.

He authors the column On Philanthropy for the Financial Times and writes the blog Tactical Philanthropy, which has been cited by the Wall Street Journal and the New York Times.

# SOCAPO8 SPEAKERS {CONTINUED}

Sean speaks regularly on the trends defining what he calls The Second Great Wave of Philanthropy and is often quoted in the media. He is a member of the World Economic Forum's Global Agenda Council on Philanthropy and Social Investing.

## KEVIN STARR

**Program Director | Mulago Foundation**

Kevin runs the Mulago Foundation and is the founder and director of the Rainer Arnhold Fellows Program. Mulago works like a social impact venture fund to seed and grow the most promising solutions in health, development, and conservation in the Third World. The Fellows program is an outgrowth of the Foundation, and works with some of the best social entrepreneurs working in the Third World to maximize their impact through a structured process of project design and evolution. Both the Foundation and Fellows program are built around a systematic way to evaluate and design for real impact that will scale up.

Kevin has been doing this work since 1996 and is currently involved in more than 20 projects around the world – from forest conservation by monks in Tibet to micro-franchise clinics in Kenya. He originally trained as a physician and continues to practice medicine (very) part-time and to teach a course on health project design at UCSF School of Medicine.

## GREG STELTENPOHL

**Chairman and Co-founder | Adina for Life**

Greg is currently the Chairman and Co-founder of Adina for Life Inc., a venture backed startup focused on building a fair trade brand with a good for you, good for the planet mission in the natural beverage category.

Greg was founder and former CEO of Odwalla, Inc. In building Odwalla, Greg was a pioneer in employing ideals of environmental sustainability, employee empowerment, creative corporate culture, and community based marketing.

Together with Visa Founder Dee Hock, Greg is co-founder and Chairman of the Interra Project. Interra supports localized markets for sustainable products by aggregating the buying power of like-minded consumers through loyalty-based payment card networks.

Greg has served on the boards of Frontier Natural Products Cooperative and Social Venture Network, and is currently active in the Sustainable Food Lab International. Greg graduated from Stanford University with a Bachelor of Science degree in Environmental Studies and currently resides in San Francisco.

## ANDREW STERN

**Partner and Office Director | Dalberg**

Andrew leads Dalberg's Washington DC and San Francisco offices, and many of the firm's efforts in engaging the private sector on global issues and development initiatives. In the last year, he has advised several leading multinational corporations on sustainable development practices and new market entry, as well as organizations focused on creating businesses that provide social services in developing countries.

Andrew has also worked with multilateral organizations and innovative nonprofit organizations on strategic planning, organizational transformation, innovations in grant-making and investment, and new program launches. He has extensive experience across several development sectors, with a particular focus on health, enterprise development and microfinance.

Prior to joining Dalberg, Andrew was in Accenture's Government Strategy Practice where he assisted US Federal agencies and international organizations. He is also the Chairman for Mothers to Mothers, an internationally recognized health program preventing HIV transmission from mothers to children. Andrew holds an MBA from Harvard Business School, a Master's in Public Policy from the Harvard Kennedy School and a BA in Economics from Princeton University.

## JONATHAN S. STORPER

**Partner | Hanson Bridgett**

Jonathan has over 19 years of experience counseling corporations, partnerships, limited liability companies and nonprofit entities in connection with business and intellectual property transactions, corporate finance, including initial public offerings, and general corporate law.

Jonathan often is called upon to provide business as well as legal advice based on his years of experience and expertise. He regularly advises clients regarding complex general corporate matters, contracts and licenses, joint development agreements, mergers and acquisitions, intellectual property, e-commerce, and technology related matters. He has particular experience with emerging growth companies.

He has served on several boards including the USF Entrepreneurship Program, the BASF Foundation, and of the Bar Association of San Francisco. He holds a B.A. from the University of North Carolina and a J.D. from the University of California, Los Angeles School of Law.

## DEREK STREAT

**Vice President of New Ventures | Unitus**

Prior to Unitus, Derek served as co-founder and CEO of Adready, a venture-funded provider of hosted services to democratize the online display advertising market.

Before that, Derek was a member of the initial executive team at Classmates Online where, as Vice President of Strategic & Corporate Development, he was responsible for developing and executing the company's growth, financing, and liquidity strategies, including the company's sale in 2004.

He also served as Vice President of Business Development and General Manager of Classmates' advertising and media business.

Prior to Classmates, Derek was an investment banker and institutional research analyst with two firms: RBC Financial Group (formerly Dain Rauscher Wessels) and Roth Capital Partners.

#### **DARREN SUDMAN**

##### **Vice President of Innovation | Advanta Bank Corp.**

As VP of Innovation, Darren helps manage ideablob.com and the KivaB4B Project. Like the rest of his colleagues, he is constantly looking for new ways to connect with and inspire the small business community through innovation.

Just prior to joining Advanta, Darren co-founded the Norristown Investment Project, a residential real estate company, and Simon's Fund, a nonprofit focused on raising awareness about sudden cardiac arrest in children. Darren's business experience also includes practicing law and working in the business group at America Online.

His best job, however, was dressing up as Snagglepuss at King's Island. Darren received a B.A. from The Ohio State University and J.D. from Capital University. He lives in Plymouth Meeting, PA with his wife and two children.

#### **MELANIE SWAN**

##### **Principal | MS Futures Group**

Melanie is a futurist and hedge fund manager based in Silicon Valley. Her work focuses on financial innovation and market design including peer-to-peer capital markets, virtual world economies, non-monetary currencies and the post-scarcity economy.

Her career has focused on finance, research, and entrepreneurship, including founding a technology startup company, GroupPurchase, which aggregated small business buying groups. She was Director of Research at Telecoms Consultancy RHK/Ovum and previously held management and finance positions at iPass in Silicon Valley, J.P. Morgan in New York, Fidelity in Boston and Arthur Andersen in L.A.

She has served as an advisor and consultant to several technology companies and is active in the community promoting science, technology, and opportunities for women. She delivers the Traders Pit simulation to groups including the Expanding Your Horizons math and science conference, and is the former Treasurer of San Francisco-based nonprofit Equal Rights Advocates. She is an Advisory Board member of the Accelerating Studies Foundation and co-moderator of the Philadelphia and Boulder Future Salons, free monthly events discussing science and technology innovations and their implications.

#### **DERON TRIFF**

##### **CEO | Changents**

Deron is the CEO and co-founder of Changents.com, an online social network that powers a new generation of "change agents" – social and environmental problem solvers around the world – to broadcast their amazing stories and utilize Web-based tools to mobilize supporters everywhere.

In addition, Deron owns and operates a boutique digital media consulting business called DAC Media Ventures that develops digital business strategies and negotiates content licensing deals on behalf of major media brands.

Prior to Changents and DAC, Deron served as Vice President of Business Development for Scholastic Entertainment and as Vice President of Digital Ventures for PBS.

Deron holds a MBA degree from McGill University in Montreal and a BA from the Grady School of Journalism and Mass Communications at University of Georgia in Athens. He currently lives in New England with his wife, Trang, and two children – Madeleine and Max. Whether ice climbing, kite boarding or launching a start-up, Deron brings a life-on-the-edge ethos to everything he does!

#### **JEFF TULLER**

##### **President | socialmarkets**

Jeff is President and co-founder of socialmarkets, a nonprofit organization dedicated to raising the visibility and liquidity of the enormous social capital being created all around us. Through socialmarkets, he promotes using both the objectivity of performance data and the subjectivity of crowdsourcing to help make social capital more tangible.

Jeff started his career with nearly a decade in the very private sector, as Vice President of Mortgage Backed Securities at Bear Stearns, and Systems Architect for Financial Analytics at State Street Bank. In 2001, he made the leap of faith into the nonprofit sector, beginning as Technology Consultant at the Securities Industry Foundation for Economic Education (SIFEE), and most recently at The Atlantic Philanthropies. In 2005, he supplemented his MS in Computer Science with an MPA from NYU's Wagner School for Public Service.

#### **TRACEY TURNER**

##### **Founder | MicroPlace**

Tracey is a well-known social entrepreneur committed to finding market-based solutions to global poverty. She is a seasoned business executive who has been involved in international development, social investing and philanthropy for more than 15 years.

Prior to founding MicroPlace, Tracey was CFO of KickStart, an organization that designs and sells products focused on poverty alleviation. In 1998, she started her first company, 4charity, a web-based marketplace for charitable giving, and served as its CEO. Earlier in her career, Tracey held a variety of positions with socially responsible firms including the Grameen Bank in Bangladesh, Calvert Ventures and the World Bank.

Tracey's numerous leadership awards include 2000 Top 25 Women of the Web Award, San Francisco Business Times Leadership Award and

# SOCAPO8 SPEAKERS {CONTINUED}

a Working Woman Magazine Entrepreneurship Award. Tracey holds a degree in engineering and economics from Dartmouth College and an MBA from Stanford Business School. Outside MicroPlace, Tracey plays left wing on her soccer team, trains for Ironman triathlons and snowshoes in Lake Tahoe with her husband.

## ERIC WEAVER

### Founder and CEO | Opportunity Fund

Under Eric's leadership, Opportunity Fund has grown into one of the nation's largest and most effective microfinance institutions, with an emphasis on both savings and credit. Opportunity Fund operates one of the nation's largest Individual Development Account (IDA) programs, and is the largest provider of micro-loans to low-income entrepreneurs in California.

Eric was one of the first seven recipients of the James Irvine Foundation Leadership Award, for to individuals who are successfully tackling some of California's most challenging problems. In addition, the Skoll Foundation has twice selected Opportunity Fund for the Skoll Award for Innovation in Silicon Valley; and the Small Business Administration named Eric its Financial Services Advocate of the Year in 2006.

## MARNIE WEBB

### Co-CEO | TechSoup Global

Marnie has been with TechSoup Global since 2001, most recently holding the position of Vice President of Knowledge Services. To help address the nonprofit sector's systemic technology challenges, Marnie works towards optimizing TechSoup Global's popular Web resource, TechSoup, and its Knowledge Services program, which includes projects such as Healthy and Secure Computing and MaintainIT.

She is the driving force behind the NetSquared Initiative, which brings the social Web to nonprofits across the globe. A sought-after speaker and writer on nonprofit technology, she understands both challenges and technological possibilities facing the sector.

Marnie is one of the founding members of the Nonprofit Emerging Technology Exchange and an organizer of the NPTech tagging experiment. In 2008, The Nonprofit Times included Marnie on its list of the 50 most influential leaders in the U.S. nonprofit sector.

## KEVIN WESTON

### Director, New Media and Youth Communications | New America Media

Kevin serves as director of New Media and Youth Communications at New America Media/Pacific News Service. He is a writer, artist and loving son.

As a journalist he was an editor and graphic designer for The San Francisco Bayview and Oakland Post. His essays and reporting pieces have appeared in the Los Angeles Times, San Francisco Chronicle, Sacramento Bee, San Jose Mercury News and the San Francisco Bay Guardian, among others.

Since 2000, he has been the director and publisher of YO! (Youth Outlook) Multimedia, a digital journal of youth life in the Bay Area and beyond. And he founded the New Media department at New America Media in 2003.

## NATHANIEL WHITTEMORE

### Facilitator | Connection Concierge for SOCAPO8

Nathaniel is a co-founder of Assetmap.org, a web-based platform to help individuals and organizations organize, visualize, and share information about the assets they can bring to bear to accomplish common goals. In that capacity he is leading a pilot program in northern Uganda designed to decrease international dependency by increasing the ease of collaboration among local community development organizations.

Nathaniel is also the founding director of the Northwestern University Center for Global Engagement, an international program design center that helps student social entrepreneurs learn directly from and work with communities experiencing the problems of poverty, injustice, and

inequality and supports the development of their. He writes regularly about social enterprise, philanthropy and international development as the editor of Change.org's Social Entrepreneurship channel, contributing blogger at "All Things Reconsidered" on Justmeans.com, and on his personal blog, dogoodwell.org. He is facilitating the Connection Concierge program at Social Capital Markets 2008, as well as live-blogging the event on socialentrepreneurship.change.org

## DWIGHT WILSON

### CEO | OneRoof

Starting with his Peace Corps service in rural Chile and Honduras (1981-1983), Dwight has spent twenty-five years working in the field of international development in the public, NGO, and now private sectors.

In 1993, Dwight founded EarthCorps, a youth service and environmental restoration program that has provided long-term training for hundreds of environmental leaders from over sixty countries. It was through EarthCorps that Dwight became colleagues with several men and women from developing countries who co-founded World Corps with him in 1998. World Corps provided training for young adult entrepreneurs in rural areas of India, Mexico, Kenya, and the Philippines to create Internet telecenters.

In 2005, Dwight and other World Corps colleagues transformed the NGO into OneRoof, a San Francisco-headquartered private company that franchises Internet telecenters in the rural Tamil Nadu state of southern India. A graduate of Yale University, with a degree in history, Dwight lives in Berkeley, California, with his wife and fifteen-year-old son.

## ANDREW WOLK

### Senior Lecturer | MIT Entrepreneurship Center

Andrew launched Root Cause, an Action Tank for the Social Sector by developing and promoting entrepreneurial social sector leadership. He has been conducting workshops and consulting on curriculum

development at major universities across the country. He is one of the Directors of a business economic development initiative at BU's Entrepreneurial Management Institute. He brought his course to Boston College's Graduate School of Management and School of Social Work, Washington University, and Heller School of Social Policy at Brandeis.

Recently, Andrew served on the Advisory Board of Fast Company Magazine's special Social Capitalist issue as well as a reader for Echoing Green. He assisted in starting a Social Venture Partners chapter in Boston and now serves on the board both locally and nationally. He also serves on the board of the Social Enterprise Alliance and was the program co-chair for the 4th National Gathering for Social Entrepreneurs. He has been a speaker at the National Gathering for Social Entrepreneurs, Vermont for Business Responsibility, Harvard Social Exchange, Starting Bloc, and More Than Money Conferences.

#### **STEVE WRIGHT**

##### **Director of Innovation | Salesforce.com Foundation**

Prior to joining the Salesforce.com Foundation, Steve worked for thirteen years in K12 education and technology. He was a high school administrator and a classroom teacher for nine years, beginning with the Peace Corps in Micronesia.

Steve joined Salesforce.com Foundation in September 2000, initially working to help youth-serving organizations maintain effective IT for both administrative and programmatic purposes. In an effort to create greater scale, Steve led the effort to build a robust product donation program. Now the Salesforce.com Foundation has donated the force.com data management platform to over 4,000 organizations in 55 countries.

It is now Steve's goal, and the goal of the Salesforce.com Foundation, to measurably increase the efficacy of the global social sector through effective data management.

#### **MARSHA WULFF**

##### **CEO | Africeuticals**

Marsha has facilitated economic development in Africa since 1997, when she assisted a US corporation entering South Africa. She connects stakeholders in entrepreneurial ventures to build indigenous African industries. Her model relies on entrepreneurial African professionals who trained in the USA ("diaspora").

She and her partners recently founded Africeuticals, Inc., a high growth business that builds Africa's private health sector, supplying and distributing certified human and veterinary products and services.

Prior roles include that of independent entrepreneur (1970's), VP of Investments (1980's), and Director of Corporate Communications and Advisor to the CEO at Pioneer, (PXD:NYSE), as it grew from \$60M to \$4B (1990's). She also served as a Director of a medical center, managing a budget of \$200 million/yr (1990-1997).

Marsha has lived and worked internationally in Taiwan, Germany, Australia, Argentina, China and Africa. She has raised five children and now enjoys sailing, yoga and grandkids.

#### **JOCelyn WYATT**

##### **Social Impact | IDEO**

Jocelyn leads IDEO's efforts in integrating design for social impact and business factors. Her career has focused on building social enterprises and advising businesses in the developing world.

At IDEO, Jocelyn has brought a business perspective to a variety of social impact projects with clients including Rockefeller Foundation, Kickstarter, Acumen Fund, and Gates Foundation. Her projects have included strategy, product design, and software design.

Prior to joining IDEO in October 2007, Jocelyn worked as an Acumen Fund fellow in Kenya with an agro-pharmaceutical company involved in

the production of malaria treatments. She served as Scojo Foundation's Interim Country Director in India and helped increase the distribution of low-cost reading glasses. Additionally, she worked in project management and business development at Chemonics International, a contractor for the U.S. Agency for International Development.

Jocelyn received an MBA from Thunderbird School of Global Management and a BA in Anthropology from Grinnell College.

#### **DAVID ZAPOL**

##### **Senior Consultant | FSG Social Impact Advisors**

David works with corporate and private foundation clients on a wide range of strategy and evaluation issues: from developing a strategy for a rural social investment fund in Rwanda, to disease-specific treatment market analyses, to recommendations for anti-malarial development programs for a large pharmaceutical client. David is particularly interested in creating strategy that helps donors achieve greater results.

He played an integral role in the team that advised the Bill and Melinda Gates Foundation and the Product Development Partnership Donor Group on a new model for evaluation of nonprofit models of neglected disease research. After building the high level frameworks, the team applied them and conducted a five-year evaluation of the International Partnership for Microbicides.

Prior to joining FSG, David worked at Investors Circle, helping develop "Slow Money", a fund focused on sustainable food systems. David also worked with the pharmaceutical consulting and software firm, Pharsight Corporation.

#### **BETSY ZEIDMAN**

##### **Director | Center for Emerging Domestic Markets (CEDM)**

Betsy is Director of CEDM and a Research Fellow at the Milken Institute in Santa Monica, CA. In managing CEDM, Betsy works with



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## HALLORAN PHILANTHROPIES

The Vision of **Holloran Philanthropies** is to create the **World We All Want** by contributing and investing in organizations that demonstrate great success in programs promoting **Global Ethics** and **Community Economic Development**. To fulfill our Vision, we are committed to supporting projects which promote **Corporate Responsibility**, **Social Capital**, **Interfaith Dialogue**, **Microfinance**, **Community Service** and **Clean Energy**. Strongly committed to sustainability, we support Microfinance Networks and individual MFIs primarily in Latin America, Clean Energy Projects throughout the World and Grassroots Community Organizations that ensure the empowerment of the poor to achieve dignified livelihoods. Holloran Philanthropies also supports **SOCIAL CAPITAL MARKETS** and projects that impact the ethical behavior of business in the society through Corporate Responsibility. We believe that business is a powerful and amazing force for positive social change. We also support projects which promote Inter-religious and Inter-cultural Dialogue among Muslims, Jews and Christians. **Holloran Philanthropies** was founded by **Harry Holloran**.

[www.holloranphilanthropies.org](http://www.holloranphilanthropies.org)

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Sophisticated donors understand the relationship between investment choices and donor dollars. Investments based solely on return can negate the positive effects of a donation. **Calvert Giving Fund**, the 100% social investment donor advised fund, provides a simple solution. The platform offers a range of asset management choices that help maximize the impact of your donated funds, even before they are granted out to charities. Your philanthropic giving power increases over time as your **Giving Fund** assets appreciate tax-free in an platform of socially-responsible mutual funds and community investments, including a global platform of cutting edge private debt and equity funds spanning micro credit, social enterprise, fair trade, alternative energy, environment and health.

A donor advised fund is the equivalent of starting your own "personal foundation" with as little as \$5,000, and none of the complications or expenses associated with a private foundation. When you open a **Calvert Giving Fund**, you receive an immediate tax-deduction and your funds start generating positive social returns through the investments you select. Our donor advised fund allows you to streamline your charitable giving, while magnifying your social impact through smart investments that make a real difference in the world. **Calvert Giving Fund** is an enterprise of **Calvert Social Investment Foundation**.

[www.calvertfoundation.org](http://www.calvertfoundation.org)

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The **50x15 Initiative**, founded by **AMD**, aims to enable affordable, accessible Internet connectivity and computing capabilities for 50 percent of the world's population by the year 2015. [www.50x15.com](http://www.50x15.com)



**Good Capital** is an investment firm that increases the flow of capital to innovative ventures creating market-based solutions to inequality and poverty. We manage the Social Enterprise Expansion Fund, which enables investors who are looking for a savvy, rigorously screened, and closely managed vehicle to align their investment strategies with their values, earn an attractive return, and maximize their total impact. We share a deep commitment to the creation of an informed and passionate world of investing that moves more capital to good.

[www.goodcap.net](http://www.goodcap.net)



Our mission is to achieve sustainable solutions to complex social problems by investing in collaboration, leadership, and entrepreneurship.

**Jean and Steve Case** founded the **Case Foundation** in 1997 to reflect their family's heartfelt commitment to finding lasting solutions to complex social challenges. Today, the foundation is pursuing a number of initiatives, and is particularly focused on three strategies: Encouraging collaboration; supporting successful leaders; and fostering entrepreneurship in the nonprofit sector.

The foundation is applying these strategies to meet the needs of underserved children and families; create thriving and sustainable economic development for communities; bridge cultural and religious divides; expand civic engagement and volunteerism; and accelerate innovative approaches to health care.

The foundation's work stretches across the United States and around the world. To date, we have supported more than 150 organizations that reflect our commitment to collaboration, leadership, and entrepreneurship -- and, ultimately, to improving the health and well-being of children, families, and communities.

[www.casefoundation.org](http://www.casefoundation.org)

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At **Nokia**, we believe in a strategic approach to community involvement — concentrating our efforts where we know we can make a unique contribution. As the global leader in mobility, we are active stakeholders in local communities around the world, where we focus on how our business can make a positive difference. We identify the most important touchpoints between our talents and the unique needs of the communities in which we operate, and work closely with the non-profit sector to address important social issues.

In mid-2007, **Nokia** and **Vodafone** launched a new wiki website to foster the sharing of ideas on how to use mobile communications to address urgent social and environmental challenges. The idea for **ShareIdeas.org** came from Ndidi Nwuneli, founder and CEO of LEAP Africa, a Nigerian NGO dedicated to nurturing a new generation of African leaders. "Groups like ours would really benefit from a resource that shows us how to use mobile technology to carry out our work more effectively," said Ndidi in 2005 at a Nokia stakeholder event of NGO and corporate leaders.

The **ShareIdeas.org** site features case studies from around the world and is divided into six thematic areas: civic engagement, economic empowerment, education, the environment, health and safety, and humanitarian relief. **ShareIdeas** was created as a wiki to enable any registered user to post a story or edit existing content.

[www.nokia.com](http://www.nokia.com) | [www.shareideas.org](http://www.shareideas.org)



**Ideablob.com** is a community to discover, share and support ideas. You'll find business owners, entrepreneurs, inventors, philanthropists, nonprofits, free-thinkers and problem-solvers hanging around the community. They post, comment, advise, critique, compare and vote on ideas. Every month, the idea with the most votes wins \$10,000 in seed money. More importantly, the community connects and collaborates. At **ideablob**, we simply believe that every idea has the potential to change the world. [www.ideablob.com](http://www.ideablob.com)



**Hanson Bridgett** provides legal services to support landmark organizations such as Good Capital, New Resource Bank, TBL Capital, Investors' Circle and PG&E. Hanson Bridgett helps clients to effectively conduct business locally and around the world. A founding B-Corporation, **Hanson Bridgett** meets comprehensive and transparent social and environmental requirements and aids other leading purpose-driven companies in setting a new corporate standard for responsible finance and performance. The firm provides in-depth expertise in the areas of Corporate Responsibility, Responsible Finance, Clean Technologies, Green Building, Organics, LOHAS Branding, Cross-Sector Partnerships, Transportation and Smart Development. [www.hansonbridgett.com](http://www.hansonbridgett.com)



**The Goldhirsh Foundation** was established by Bernard A. Goldhirsh in 2000, shortly after he was diagnosed with brain cancer. Since his death in 2003, the Board of Directors of the Foundation (which includes his two children) has been shaping a grantmaking program that reflects his values and entrepreneurial spirit. We are dedicated to making a difference in the lives of people touched by the organizations and projects we support. A significant portion of the Foundation's annual grantmaking is devoted to support for brain tumor research, through two competitive, peer-reviewed application processes.

Beginning in 2006, the Board of the **Goldhirsh Foundation** has invited project proposals from various social entrepreneurial ventures. These investments are made at the initiative of the Foundation; we do not accept unsolicited applications. In addition, the Foundation supports social and educational programs that reflect the commitments of the Goldhirsh family, also at the Board's initiative.

[www.goldhirshfoundation.org](http://www.goldhirshfoundation.org)

# SOCAP08 SPONSORS {CONTINUED}

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**Opportunity Fund** advances the economic well-being of working people by helping them earn, save, and invest in their future. We've identified what it takes for Bay Area working families to get ahead instead of just getting by. By investing in individuals, families, businesses, and entire communities, we create opportunities for our clients to transform their lives. Our comprehensive approach incorporates financial education, microfinance, matched savings, and real estate financing for affordable homes and community spaces. [www.opportunityfund.org](http://www.opportunityfund.org)



We are working toward a time when every social benefit organization on the planet has the tools it needs to accomplish its mission. Founded in 1987 as CompuMentor, **TechSoup Global** is a recognized leader in bringing technological empowerment to social benefit organizations across the world. We currently provide services in 21 countries.

We forge partnerships between NGOs, corporations, individual technologists, and philanthropic foundations to create a unique network which addresses the unmet technology needs of NGOs and other social benefit organizations on 6 continents. [www.techsoup-global.org](http://www.techsoup-global.org)

reception sponsor



**GOOD** is a collaboration of individuals, businesses, and non-profits pushing the world forward. We make a magazine, produce videos, curate a web site, and host events around the country. We see a growing number of people tied together not by age, career, background or circumstance, but by a shared interest. It revolves around a passion for potential mixed with fierce pragmatism and creative engagement. We sum all this up as the sensibility of giving a damn. But to shorten it, we call it **GOOD**. We're here to push this movement forward and cover its realization by providing a platform for people to engage with the most interesting and important issues of our time. Come join us.

[www.good.is](http://www.good.is)

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Every project is a puzzle, and the pieces are the ideas, skills, materials, relationships and other assets that must be leveraged for success. **Assetmap.org** helps individuals and groups accomplish their goals by enabling them to organize and visualize information about their assets and needs. With assetmap.org, need becomes have, can't becomes can, and everyone has something to contribute. [www.assetmap.org](http://www.assetmap.org)



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**Xigi Software's** unique "insight engine" allows groups to share information about people and data in entirely new ways. **Xigi** allows people to perform collaborative research, "map" people networks, and work across organizational silos to solve complex problems. An early version of the **Xigi** software powers **Xigi.net**, the non-profit social network for the social capital arena. [www.xigi.biz](http://www.xigi.biz)

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### ADINA

**Adina** is dedicated to producing great tasting, better-for-you fair trade beverages, using only natural and/or USDA organic, directly-sourced ingredients from around the world. **Adina's** healthy and exotic blends made with authentic ingredients offer consumers an invitation to reconnect with the ancient wisdom of nature. [www.adinaworld.com](http://www.adinaworld.com)

### ALTER ECO — FAIR TRADE

**Alter Eco** has a singular approach to the economics of today. Indeed, we believe that efficient and profitable business models along with development for all are concepts that can go hand in hand. We feel consumers can not only benefit from a production process that protects the planet and its people, but also that they can be empowered by such a system. By buying Fair Trade products, consumers can enjoy goods of exceptional quality and actively contribute to sustainable development at the same time. With this in mind, **Alter Eco** strives to make the widest possible range of Fair Trade products (from coffee to chocolate, from sugar to rice) available to consumers in their daily grocery shopping. [www.altereco-usa.com](http://www.altereco-usa.com)

### GUAYAKI YERBA MATE

**Guayakí** has pioneered an innovative business model called Market Driven Restoration in which **Guayakí** serves as a bridge linking consumer purchases of healthy yerba mate products in North America with indigenous communities engaged in sustainable agriculture and reforestation projects in Argentina, Paraguay and Brazil. Each person that drinks two servings per day of **Guayakí Yerba Mate** helps protect approximately one acre of rainforest every year. With a passion for mate, **Guayakí** partners with small farmers and indigenous communities to source mate from the sub-tropical forests of South America. From the simple love of a beverage, **Guayakí** drinkers have become a driving force for conservation and community development by paying a fair trade price for rainforest-grown mate. In honor of the Aché Guayakí people native to the mate forest, we bring you **Guayakí Yerba Mate**. [www.guayaki.com](http://www.guayaki.com)

### MENDOCINO WINE COMPANY — PARDUCCI WINE CELLARS

**Parducci** is "Family Farmed," locally owned and operated in California's Mendocino County. We are committed to Sustainable Winegrowing practices that yield top quality grapes and wines while protecting the environment and supporting our communities and local farmers. **Parducci Wine Cellars** makes environment-friendly choices because they are the right ones; right for the planet and right for the wine. From cover crops in the vineyard and bio-diesel tractors to labels made from 100% consumer recycled papers and soy based inks, **Parducci** is creating a model of quality and environmental sustainability for other wineries to follow. **Parducci** - the First Winery in the U.S. to be Carbon Neutral! [www.mendocinowinecompany.com/parducci.html](http://www.mendocinowinecompany.com/parducci.html)

### VEEV VODKA

**VeeV** founders Courtney and Carter Reum, former investment bankers, left Wall Street in 2006 to start a venture that was equal parts entrepreneurial, progressive and meaningful. In that spirit, the Reum brothers created **VeeV**, the world's first spirit to introduce the Brazilian super-fruit, açai. Among being the country's foremost and only certified carbon neutral spirit, **VeeV's** eco-friendly business activities include donating \$1 of every bottle sold to the Sustainable Açai Project, utilizing a distillery that is powered by wind energy, and implementing regular "VeeV Green Audits". Additionally, **VeeV** is a proud member of the Business for Social Responsibility, the Social Venture Network and other leading environmental organizations. **VeeV- A Better Way to Drink™** [www.veevlife.com](http://www.veevlife.com)

### VODKA 14

Bringing together the finest hand-selected USDA Certified Organic grain and the purest Rocky Mountain spring water with the best in distillation technology, **Vodka 14** sets a new benchmark for purity and taste. Crafted in the Rocky Mountains using no chemical additives, **Vodka 14** delivers an award-winning taste that *Spirits Journal* described as "wonderfully clear and pristine." But to truly appreciate **Vodka 14**, you must taste it for yourself. [www.vodka14.com](http://www.vodka14.com)

# TRANSPARENCY AT SOCAPO8

\*We've made every effort to make SOCAPO8 an environmentally conscious event, making the best decisions we could to balance a great attendee experience with carefully-managed resource usage. The conference bags, show guide, name badges and lanyards, signage, catering service, water service — even the location itself — were all carefully chosen to achieve this balance. We hope you'll agree we succeeded.

**BAGS:** Rickshaw Bagworks is pleased to present SOCAPO8 attendees with its new ZERO™ messenger bag. The ZERO™ is specially designed to optimize fabric cutting and eliminate material waste. In addition to wasteless manufacturing, the ZERO™ is made from scratch in Rickshaw's new San Francisco factory, entirely from domestically sourced materials, minimizing its logistics footprint. To facilitate recycling, the bag is made entirely of nylon. Rickshaw is a new San Francisco-based messenger bag and urban gear company specializing in the design, manufacturing and marketing of shoulder bags, backpacks, laptop cases, bicycling bags and accessories. [rickshawbags.com](http://rickshawbags.com)

**CATERING:** Acre Gourmet Catering works with organizations to design food programs, menus, kitchens and dining areas with health, community and efficiency in mind. We have worked on many projects we are proud of: from schools where we operate our Acre Real Lunch programs, to the Pescadero Unified School District, where we are currently developing an entirely new food program, combining infrastructure and healthy choices with education. All food and serving items at SOCAPO8 will be recycled, reused or composted. [www.acregourmet.com](http://www.acregourmet.com)

## FORT MASON CENTER:

Situated on 13 waterfront acres with a stunning view of San Francisco's Golden Gate Bridge, Fort Mason Center is a fascinating historic landmark and a lively, ever-changing reflection of the dynamic Bay Area community. The Center, a model of military base conversion, befriends visitors from every walk of life, providing them with a unique opportunity to experience a diverse and eclectic mix of culture, education, and recreation in an exciting urban park environment. Until 1962 Fort Mason was a military installation,

an embarkation port for soldiers and sailors headed for the Pacific during the Korean conflict and World War II. In 1972 Congress created the Golden Gate National Recreation Area (GGNRA), an urban park with several thousand acres of shoreline. Fort Mason was included in the park. By 1976, the National Park Service (NPS) had received more than 400 proposals for use of lower Fort Mason, including the suggestions of two citizens' advisory commissions. On the basis of these ideas, Fort Mason Foundation was formed to administer a wide variety of programs. In 1977, Fort Mason Center opened its doors. [www.fortmason.org](http://www.fortmason.org)

## THE GEODOME:

The GeoDome is a rapidly deployable and highly engaging immersive visual computing environment. It enables participants to collectively and interactively explore a broad range of visualized social, environmental, and economic data to better understand complex phenomena. By placing scientific datasets within a systems-oriented global and cosmic context, it provides an effective vehicle for focusing attention on the crucial narratives and deep interconnections affecting all humanity. [www.geodome.info](http://www.geodome.info)

## NAME BADGE AND LANYARD:

Our lanyard is made of 100% biodegradable and renewable bamboo, with a recyclable plastic hook. The logo is printed with a water based ink. Our name badges are packed with handfuls of the highest quality seeds. More than recycled, our paper comes from 100% post consumer junk mail. When planted and watered, the paper biodegrades away and the seeds are left to germinate into a garden of growth. The badge holder is made from EarthFirst® PLA film. EarthFirst PLA film is made using corn kernels, an annually renewable resource, instead of petrochemicals. EarthFirst PLA film is compostable and is entirely environmentally friendly since it starts as a natural product and ends as a natural product with no impact on the environment. [www.boundlessnetwork.com/norcal](http://www.boundlessnetwork.com/norcal)

## PAPER FOR PROGRAM GUIDE:

This conference guide is printed New Leaf Reincarnation Matte, made with 100% recycled fiber and 50% post-consumer waste, processed chlorine free, designated Ancient Forest Friendly™, and manufactured with electricity that is offset with Green-e® certified renewable energy certificates. New Leaf Paper leads the paper industry in the development and distribution of

environmentally superior printing and office papers. New Leaf offers more than 30 spectacular product lines of coated, uncoated, and board grade papers and all are environmental leaders. Printers, designers, corporations, businesses, and nonprofit organizations choose New Leaf Paper for its high quality, affordability, and environmental responsibility. [www.newleafpaper.com](http://www.newleafpaper.com)

## SIGNAGE:

The Eco Board which is used for the signs at SOCAPO8 is sustainable fiber board made from recycled paper waste and is repulpable and biodegradable. It is a great substitute for MDF and plywood sign as it is not only recyclable but also non-toxic and light weight. Eco board is processed in an eco-friendly, no chlorine, no pvc, no wax manufacture, and can be printed with soy or UV curable ink. [www.prioritygraphics.com](http://www.prioritygraphics.com)

## STAFF T-SHIRTS:

SOCAPO8 staff t-shirts were produced by Ashbury Images and are made of 100% organic cotton. Ashbury Images is rebuilding lives one shirt at a time. They provide employment to people who are very low-income, formerly homeless, or have recently completed a substance abuse recovery program. In a rigorous, yet encouraging, training environment, Ashbury Images helps them to build self-esteem and learn valuable new job skills. Alumni of the program are currently working in a variety of industries including multimedia, retail, law, and youth counseling. Profits from Ashbury Images (AI), support the homeless, youth and family service programs of AI's non profit parent organization, New Door Ventures (NDV). [www.ashburyimages.org](http://www.ashburyimages.org)

## WATER DISPENSERS:

The water you are drinking at SOCAPO8 comes from U.S. Pure Water Corp. In all the venues, whether dispensed from water bottles in the smaller rooms, or coming through the faucet in Herbst, the source is the same. US. Pure Water's aim is to reduce plastic waste & the use of fossil fuel in the delivery and production of plastic bottles, by providing equipment which treats at the point-of-use (i.e. at your kitchen sink, your break room at work, or your grocery store), rather than at a treatment plant far away. USPW converted SF City & County to POU systems and is helping to green events preventing 100s of thousands of bottles from landing in the waste stream. [www.uspurewater.com](http://www.uspurewater.com)