

# Intentionally Designed Roundtable at Total Impact Philadelphia

Endowments Investing for a Thriving, Sustainable Economy

**May 2, 2019, 1pm - 4:30pm**

## **Agenda**

*(Draft - updated as of April 24)*

This workshop is designed to be a continuous conversation with experts and peers about how your college or university endowment can achieve its risk and return objectives, align with your institutional mission and contribute to creating a thriving, sustainable economy. Our work together will be guided by the Roadmap for Intentionally Designed Endowments – a step by step process which grew out of the experiences of our network of colleges and universities. There will be a series of presentations, each of which will be followed by roundtable discussions where participants can have their burning questions addressed and work with peers and experts to create or advance action plans for their own institutions.

**1:00pm**

**Welcome**

**1:05pm**

**Keynote Address - Governance and Building Consensus**

William Jarvis, Managing Director, Bank of America

**1:35pm**

## **The Roadmap for Intentionally Designed Endowments: An Overview**

**1:45pm**

### **Setting the Stage: Learning, Building Consensus and Setting Policy**

University investment professionals will describe the process of creating intentionally designed endowments on their specific campuses from defining what alignment means for their institutions through building consensus, to formalizing objectives and processes in an Investment Policy Statement.

Speakers: TBD (CFO, Trustee, CIO focus)

**2:15pm**

### **Dialogue with Peers and Experts**

**2:45pm**

### **Coffee Break**

**3:00pm**

### **Aligning the Endowment Portfolio with Mission**

In an interview, Libby George will describe the process and discuss the impacts of aligning investments with mission including assessing the current portfolio, making asset allocation and investment decisions and monitoring and communicating progress. We will explore the benefits of including environmental, social and governance factors (ESG) in risk analysis and of making investments that have a positive environmental and social impact.

Interview: Libby George, Director of Investments, NC State University

**3:30pm**

### **Dialogue with Peers and Experts**

**4:00pm**

### **Bringing it All Together and Action Planning**

An opportunity to create next steps and action plans for your institutions