

PRI Makers

NETWORK

Program-Related Investments Conference

January 18-20, 2006

Palo Alto, CA

Co-sponsored by:



**CENTER FOR
SOCIAL INNOVATION**

STANFORD GRADUATE SCHOOL OF BUSINESS

PRI Makers

NETWORK

A special pre-conference session offered on Wednesday, January 18, 2006 –

including those not currently making PRIs or other social investments. Through its activities, the PRI Makers Network seeks to strengthen the capacity of grantmakers to affect change across diverse program areas.

Whether you are an experienced PRI maker or interested in learning more about how program-related investments (PRIs) can be an important part of your philanthropic strategy, join your colleagues for an important forum on program-related investments.

With support from the world-class faculty of the Center for Social Innovation, Stanford Graduate School of Business as well as other experts and practitioners in the field, this conference will highlight best and innovative practices in program-related investing, including ways in which this important philanthropic tool complements grantmaking strategies.

PRI Fundamentals for Grantmakers – will introduce and explore the many opportunities, challenges, and implications of using program-related investments as part of a philanthropic strategy. This session is available separately for grantmakers early in their PRI-making careers, or as part of the larger conference for grantmakers interested in a basic review of the essentials.

The PRI Makers Network is an association of grantmakers who use program-related and other investments to accomplish their philanthropic goals. Its mission is to provide a forum for networking, professional development, collaboration and outreach to funders,

Conference registration is restricted to grantmakers interested in PRIs, with or without prior PRI experience. An introductory membership in the PRI Makers Network is free to grantmakers. To join, please contact Kim Honor, Neighborhood Funders Group, at (202) 833-4690 ext. 7 or kim@nfg.org. Conference registrations will be accepted via www.PRIMakers.net after October 24, 2005.

Conference Agenda

Wednesday, January 18

The Sheraton Hotel, Palo Alto

12:00 noon – 6:00 pm

Conference Registration

1:00 – 5:00 pm

PRI Fundamentals for Grantmakers

Pre-conference, introductory session for grantmakers who are new or relatively new to PRIs — or who just want a review to enhance their experience of the conference to follow. (Available as a stand-alone training session for grantmakers.)

6:00 – 9:00 pm

Reception and Dinner

The Role of PRIs in Creating Scale and Leverage

Nancy O. Andrews, President and CEO

Low Income Investment Fund

Nancy Andrews has been a leader in the PRI field for nearly two decades — first as the head of PRIs at The Ford Foundation and more recently as the leader of the Low Income Investment Fund, a California-based CDFI.

Thursday, January 19

Arrillaga Conference Center, Stanford

8:00 am

Shuttle from Hotel to Stanford Campus

8:00 am – 12:30 pm

Conference Registration

8:15 am

Breakfast

8:45 am

Opening Plenary

The Evolution of PRIs

Luther M. Ragin, Jr., Vice-President for Investments

F.B. Heron Foundation

Luther Ragin has brought substantial professionalism, rigor and innovation to a diverse and growing portfolio of program-related and mission-related investments.

The Spectrum of Foundation PRI Strategies

A panel of foundation representatives will explore the different ways philanthropic institutions – of various sizes and missions – have opted to implement PRI strategies.

10:30 am

Break

11:00 am

Concurrent Workshops

Participants will select one of the following brief panel presentations and interactive discussions on the different sectors that have received significant PRIs.

- Community Development and Housing
- Micro-Finance
- Environment and Conservation
- International Sustainable Development
- Employment and Training

12:30 pm

Luncheon

PRIs as a Bridge to the Capital Markets

Jed Emerson, Senior Fellow
Generation Foundation

Jed Emerson has been a provocative writer and thought leader in this field who has popularized the concept of blended value investing and the Unified Investment Strategy for Foundations.

- *Panel Discussion on Leveraging PRIs to Raise Capital*

2:00 pm

Break

2:30 pm

Repeat Concurrent Workshops

4:15 pm

Open Mic

Stanford faculty will facilitate a session in which participants debrief the day, sharing insights, thoughts, strategies and issues.

5:00 pm

Cocktail Reception

5:45 pm

Shuttle to Hotel

7:00 pm

Dine-A-Rounds

Conferees may sign up for a restaurant group or make their own dinner arrangements.

Friday, January 20

Arrillaga Conference Center, Stanford

7:45 am

Shuttle from Hotel to Stanford Campus

8:00 am

Breakfast Roundtable Discussions

Colleagues will informally gather over breakfast to share strategies and ideas. Table topics include:

- Guarantee mechanisms
- Workouts
- Partnerships that work
- Talking to your trustees
- MRIs vs. PRIs
- Common covenants
- Reporting requirements
- Strategic communications

9:15 am

Plenary Panel and Discussion *Evaluations and Tracking Social Outcomes*

Academic and philanthropic experts will guide participants through current approaches to evaluations and measuring social impacts.

10:45 am

Break

11:00 am

Closing Plenary *PRIs Looking Forward*

12:00 noon

Conference Adjourned

Registration Instructions

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Tuition for the PRI Conference is \$425 and includes all activities, including the pre-conference PRI Fundamentals for Grantmakers.

Tuition for the pre-conference PRI Fundamentals for Grantmakers *only* is \$150.

Registrations must be received by December 19, 2005.

Registrations received after December 19, 2005 or on-site, if space permits, will be charged an additional \$35 processing fee.

Online conference registration will be available after October 24, 2005. Please visit www.PRIMakers.net to register.

Hotel Information

To make a reservation, contact The Sheraton Hotel and mention the Program-Related Investments Conference.

The Sheraton Hotel
625 El Camino Real
Palo Alto, California 94301
Phone (800) 874-3516 or
(650) 328-2800
Fax (650) 327-7362

You must reserve your room by December 19, 2005 to guarantee the discounted conference rate of \$179 (single/double).

All conference activities will take place at The Sheraton Hotel Palo Alto and the Arrillaga Conference Center, Stanford University. Transportation between the hotel and the conference center will be provided.

For More Information or to Become a Member

Contact Kim Honor, PRI Makers Network, (202) 833-4690 ext. 7
kim@nfg.org
or visit www.PRIMakers.net.

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The PRI Makers Network, an association of grantmakers who use program-related and other investments to accomplish their philanthropic goals, is administered as a special project of Neighborhood Funders Group. Visit www.nfg.org.



CENTER FOR
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The Center for Social Innovation builds and strengthens the capacity of individuals and organizations to develop innovative solutions to social problems that produce a more just, sustainable and healthy world.

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