

The Bay Area Opportunity Zone Forum



The next Bay Area Opportunity Zone Forum co-hosted by the Bay Area Council & KPMG, will be held over breakfast on Thursday, March 21st, 2019.

- Bay Area Opportunity Zone Forum
- Thursday March 21st, 2019
- 9:00am - 12:00pm, 8:30-9:00 am arrival
- Bay Area Council
- 353 Sacramento Street, San Francisco, California 94010

Dozens of impoverished and low-income areas around the Bay Area are eligible for investment under a new federal Opportunity Zone (OZ) program. The Bay Area Council and KPMG are co-hosting this morning's event in a series of regional forums focused on bringing together diverse stakeholders to discuss how opportunity zones can be leveraged regionally to produce positive outcomes across infrastructure, business and real estate, and generate a wide range of job-creating economic activity. This specific forum will gather leaders from across the country, state and region to address key public sector issues related to OZs, strategies for organizations and investors that are not directly incentivized by the tax incentives, and considerations for adopting best practices in this emerging market.

The Bay Area Council & KPMG would like to give special thanks to sponsors Confluence Philanthropy and Tonic Network for supporting this morning's program.



AGENDA

The Bay Area Opportunity Zone Forum

Thursday, March 21st | 8:30-12pm
Bay Area Council, 353 Sacramento St, 10th fl, San Francisco

Program Agenda:

- 8:30-9:20 am** Arrival, Registration, Breakfast, Networking
- 9:20** **Welcome**
- Jim Wunderman, CEO & President, Bay Area Council
- Introducing State Guest of Honor, Fiona Ma**
- Chris Gruwell, CEO, New Deal Advisers
- 9:30** **Public Sector Opportunity Zones Deep Dive**
- **Stephen Malta**, Community Development Consultant, Bay Area Council (Moderator)
 - **Leigh Halverson**, Director of Strategic Partnerships, FUSE Corps
 - **Ann Rogan**, FUSE Executive Advisor, City of Stockton
 - **Honorable Fiona Ma**, California State Treasurer
 - **Evan Weiss**, Director, PEL Analytics
 - **Marisa Raya**, Special Projects, Economic & Workforce Development, City of Oakland
 - **Nathan Donato-Weinstein**, Senior Executive Analyst, City of San Jose's Office of Economic Development
- 10:15** **Local City Office Presentations on Opportunity Zones**
- **Marisa Raya**, Special Projects, Economic & Workforce Development, City of Oakland
 - **Nathan Donato-Weinstein**, Senior Executive Analyst, City of San Jose's Office of Economic Development
- 10:25** **Introducing Special Guests**
- **Dana Lanza**, CEO, Confluence Philanthropy
- 10:30** **Cross-sector Strategies for Engaging with Opportunity Zones**
- **Greg Nelson**, Strategy and Operations, Parker Media LLC / Parker Foundation (Moderator)
 - **Fran Seegul**, Executive Director, U.S. Impact Investing Alliance
 - **Frank Altman**, CEO, Community Reinvestment Fund USA
 - **Nickolas Silbergeld**, Senior Investment Officer, Calvert Impact Capital
- 11:15** **Leveraging Existing & Emerging Best Practices for Fund & Investment Strategy**
- **David Bank**, CEO & Editor, Impact Alpha (Moderator)
 - **Jennifer Collins**, Fellow in Residence, Beeck Center for Social Impact + Innovation Georgetown University
 - **Bryan Locascio**, Senior Associate, Tideline
 - **Sara Olson**, CEO, SVT Group
 - **Aurelle Amram**, Manager, Third Sector Capital Partners, Inc.
 - **Daniel Palmer**, Operations Lead, Blueprint Local
- 12:00** **End of Forum**

Jim Wunderman, CEO & President, Bay Area Council



Making the Bay Area the most globally competitive and economically productive region in the world takes hard work, deep commitment and talented professionals. Along with our incredible executive leadership and the many important partners with whom we work across this great region, the Bay Area Council is fortunate to have the best and brightest group of professionals working daily to solve our biggest challenges. Their passion, energy and focus fuel our success and that of the entire region.

Jim Wunderman is President and CEO of the Bay Area Council, a CEO-led public policy organization focused on making the San Francisco Bay Area and Silicon Valley the most globally competitive and economically productive region in the world. Since becoming President and CEO in April 2004, Jim has honed the Bay Area Council's regionalist approach to advocacy in the key areas that impact the Bay Area's economy and competitiveness, including: Business Climate, Education, Infrastructure, Healthcare, Transportation, Renewable Energy, Sustainability, Land Use, and Cyber security. The organization has received consistent acclaim for providing business leadership on these and other issues.

Jim has led the Bay Area Council's efforts to promote the Bay Area's global leadership, including hosting the Asia-Pacific Economic Conference in 2011, opening two offices in China (Shanghai and Hangzhou) and being selected in 2013 by Governor Jerry Brown to open the State of California's official trade office in China.

Jim has played an instrumental role in securing federal, state and regional funding for major transportation projects completed or under construction. He has worked to support education improvement at all levels, with a particular focus on the use of data systems to inform decision making, as well as the early educational needs of young children. Under his leadership, the Bay Area Council has continued to play a key role in efforts to achieve consensus-based solutions to California's water challenges, and is leading the region's business community in the effort to make sure the economy is a primary driver of regional planning and sustainability efforts.

With Jim at the helm, the Bay Area Council has continued its tradition of working in partnerships to bridge the divides between economic, environmental and social equity interests. The Bay Area Council-led "Bay Area Family of Funds" raised over \$200 million to direct investments into business and projects with double and triple bottom lines. The Bay Area Council worked constructively to provide important input to AB32, California's landmark Global Warming Solutions Act of 2006, and SB375, another innovative state law designed to create sustainable communities through integrated regional land use and transportation planning to reduce vehicle trips and greenhouse gases. Following passage of the law, Jim was appointed by California Air Resources Board Chair Mary Nichols to the committee that developed the implementation standards that were adopted and now govern the regional "Sustainable Community Strategies."

During Jim's tenure, the Bay Area Council's membership has expanded significantly, as has the engagement of major business leaders throughout the region in the organization's public policy agenda. The Bay Area Council holds major policy forums and focused discussions on key issues, organizes meetings with international leaders on trade and related matters, and regularly introduces business leaders to government officials, including elected representatives and agency heads at all levels. He has built strong working relationships with the Bay Area's regional agencies including BART, the Metropolitan Transportation Commission (MTC), the Association of Bay Area Governments (ABAG), the Bay Area Air Quality Management District (BAAQMD) and the Bay Conservation and Development Commission (BCDC). He also has established strong, cooperative ties with other regional business and economy focused groups in California, the United States, and internationally.

During his career, Jim has served on numerous boards and commissions. Key among them, he served as Chairman of the San Francisco Chamber of Commerce, Treasurer of the California Child Care Resource and Referral Network, and as a member of the California Pacific Medical Center Board. He currently serves as Chair of the California Preschool Business Advisory Council and on the boards of the East Bay Zoological Society (Oakland Zoo), Bridge Housing Corporation, Fisher Center for Real Estate & Urban Economics, Sierra Energy, and TMG Partners.

Jim is a Visiting Professor at the UC Davis Graduate School of Management, teaching a course in Executive Leadership. He is a graduate of San Francisco State University, majoring in political science, and received an Associate's Degree in Business Administration from Kingsborough College, City University of New York. Jim resides in Contra Costa County with his wife, Kristina. He has four children.

Introducing State Guest of Honor, Fiona Ma, California State Treasurer

Chris Gruwell, CEO, New Deal Advisers



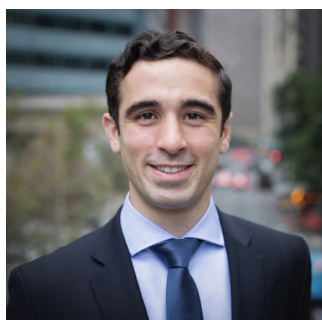
Chris Gruwell is the CEO of New Deal Advisers and has a record of successful lobbying in San Francisco starting in 2001. Prior to founding New Deal, Chris was the co-owner and President of SF Platinum Advisors.

In his tenure in San Francisco, Chris has helped his clients secure over \$13 billion in government contracts. He successfully entitled the Salesforce Tower, the tallest building west of the Mississippi. On behalf of the tech community, Chris passed major tax legislation, including the pre-IPO tax exemption and legislation to eliminate the payroll tax in San Francisco.

Prior to his work in public affairs, Chris was California Lt. Governor Gavin Newsom's finance director during his successful San Francisco mayoral campaign and an aide to the California Assembly Majority Leader.

Chris serves on the Board of Directors of the San Francisco Host Committee and civic technology incubators Tumml and SuperPublic. He is the Chair of the SPUR Good Government Awards and a Founding Trustee of the Laborers' Community and Training Foundation. Additionally, Chris is a delegate to the San Francisco and the San Mateo Labor Councils. A former U.S. Army Ranger, Chris has served as a Veterans' Affairs Commissioner for the City and County of San Francisco. He is a graduate of UCLA.

Stephen Malta, Community Development Consultant, Bay Area Council (Moderator)



Stephen Malta is a Community Development Consultant for the Bay Area Council, responsible for opportunity zone initiatives including events and meetings, advising on policy, and exploring related strategic initiatives. He is also working directly with the CEO of the Bay Area Council to launch and raise a Bay Area private equity & real estate fund. Stephen previously worked for the Council's Global Initiatives team where he led implementation of marketing strategy and provided organizing support for events that ranged from educational forums to startup competitions. Most recently, a startup competition that sourced 60 applicants in two weeks of businesses interested in global market-expansion to China. Prior to the Council, Stephen worked as a community organizer for Bay Area non-profit and corporate social impact organizations and as a product marketer at Pluralsight, a leading technology training company. Stephen is a San Francisco native and earned his degree in business administration from the University of San Francisco.

Leigh Halverson, Director of Strategic Partnerships, FUSE Corps



Leigh Hanson is the Director of Strategic Partnerships at FUSE Corps. In this capacity she works with local government partners across the country to develop FUSE Fellowship projects to advance their highest priority initiatives.

Leigh brings considerable experience in local government and the social sector to her role at FUSE. Leigh previously served as Pittsburgh Mayor William Peduto's Deputy Chief of Staff for Economic Development. She was responsible for managing the Mayor's philanthropic portfolio and numerous public-private partnerships. Leigh engaged with local and national foundations and generated significant private resources to support key City priorities.

Leigh has also worked in the philanthropic sector for almost 10 years, most recently at the Heinz Endowments where she served as Strategic Projects Advisor to the President. Prior to that role, she served at The Pittsburgh Foundation as Special Assistant to the President and CEO, where she helped to manage major initiatives, including Talent City and an executive recruitment and hiring partnership with the City's new mayoral administration.

Leigh earned her bachelor's in international affairs and economics from Lewis and Clark College in Portland, OR. After serving with the Charitable Division of U.S. Bank, Leigh also earned a Masters of Public Policy and Management from Carnegie Mellon University with a focus on nonprofit management.

Ann Rogan - Executive Advisor, Economic Innovation, Office of the Mayor - City of Stockton, CA



Ann combines entrepreneurial and global partnerships experience to help define business strategy and new services for early-stage companies. She is currently leading an economic innovation portfolio for Mayor Michael Tubbs' Office in Stockton that oversees workforce access, green economy opportunities and Opportunity Zone strategy.

Starting in rural India, her work in emerging markets has spanned sectors - including education, healthcare, clean energy, and digital identity. Ann has co-founded two companies in renewables and 3D printing - both focused on tackling last mile access challenges. Most recently, she served on the Government of Estonia's e-Residency Advisory Group to advance digital entrepreneurship.

Prior to that, she led the team responsible for global strategy and community development at Singularity University in Silicon Valley. Ann earned a BA from McGill University in International Development and English Literature. She tweets sporadically [@amrogan](https://twitter.com/amrogan).

Fiona Ma, State Treasurer, California



Fiona Ma is California's 34th State Treasurer. She was elected on November 6, 2018 with more votes (7,825,587) than any other candidate for treasurer in the state's history. She is the first woman of color and the first woman Certified Public Accountant (CPA) elected to the position.

The State Treasurer's Office was created in the California Constitution in 1849. It provides financing for schools, roads, housing, recycling and waste management, hospitals, public facilities, and other crucial infrastructure projects that better the lives of residents.

California is the world's fifth-largest economy and Treasurer Ma is the state's primary banker. Her office processes more than \$2 trillion in payments within a typical year.

She provides transparency and oversight for the government's investment portfolio and accounts. She also invests and provides oversight for the state's surplus funds.

Treasurer Ma oversees an investment portfolio of more than \$90 billion, approximately \$20 billion of which are local government funds. She is responsible for \$85 billion in outstanding general obligation and lease revenue bonds of the state.

The Treasurer works closely with the State Legislature to ensure that its members know the state's financial condition as they consider new legislation. She gives her own recommendations for the annual budget.

Treasurer Ma was a member of the State Assembly from 2006-2012, serving as Speaker pro Tempore from 2010 to 2012. She built a reputation as a solution-oriented public servant and was adept at building unlikely coalitions to overcome California's most complex problems. Prior to serving as Speaker pro Tempore, she was Assembly Majority Whip and built coalitions during a state budget crisis to pass groundbreaking legislation that protected public education and the environment while also expanding access to health care.

As an Assembly Member, she authored 60 bills that were signed into law by two different governors – most were first-in-the-nation and required no taxpayer money. Her successful legislation to ban toxic chemicals in baby products, known as phthalates, became a model for federal legislation that was authored by U.S. Senator Dianne Feinstein in 2008. She chaired the Assembly Select Committee on Domestic Violence and spearheaded legislation that strengthened laws protecting victims of domestic violence, consumers and working families; prevented the spread of Hepatitis B; increased access to quality healthcare; and, provided equal rights for all Californians.

From 2002-2006, she served on the San Francisco Board of Supervisors and championed a human rights campaign to end human trafficking in massage parlors and to close prostitution rings. She led an effort to create the city's Disadvantaged Business Enterprise program to empower small businesses to more easily participate in public works projects.

Treasurer Ma first became involved in public service in 1994 when she was elected president of the Asian Business Association, where she began advocating at San Francisco City Hall and the State Capitol on behalf of minority business owners. Her work resulted in her election in 1995 as a delegate to the White House Conference on Small Business, where she advocated for socially responsible contracting for minorities and women in San Francisco, ultimately producing a report to Congress detailing 60 top policy recommendations to help small businesses grow and prosper in the 21st century.

Also in 1995, she was appointed to the Assessment Appeals Board of San Francisco by the San Francisco Board of Supervisors. That year she started her public service career as a part-time district representative for then-State Senator John Burton and served as Burton's district representative until her election to the San Francisco Board of Supervisors. For Burton, she was responsible for helping constituents with Medi-Cal, Workers' Compensation, Unemployment Insurance, Franchise and Employment Development Department taxes, and professional licensing.

From 1989-93 she worked for Ernst & Young, before starting her own accounting practice in San Francisco. Ernst & Young was one of the largest professional services firms in the world and considered one of the "big four" accounting firms.

Most recently before being elected Treasurer, she was an elected member of the California Board of Equalization from 2015 until January 2019 and worked to protect the rights of taxpayers while ensuring California collected its fair share of tax revenues. Her district covered 23 counties in California and included approximately 9.5 million people.

Upon being selected Chairperson of the Board of Equalization in 2016, she ordered three external audits of the agency and helped lead the biggest reforms for accountability and efficiency in that agency's history.

A top priority for her on the Board of Equalization was ensuring that everyone pays their fair share of taxes, including efforts to require online-retailers such as Amazon to collect sales taxes on transactions from third-party sellers in order to help local brick-and-mortar retailers compete – ultimately generating new revenues estimated between \$431 million and \$1.8 billion for California every year. She also advocated for taxing e-cigarettes similarly to other tobacco products – deterring vaping and smoking and paying for health costs related to tobacco use. In 2017, voters passed Proposition 56 with two-thirds of the vote, collecting \$1.7 billion in new tobacco taxes to fund anti-smoking programs and Medi-Cal payments for the poor.

Also while on the Board of Equalization, she identified the cannabis industry as the largest shadow economy in California with "hundreds of millions of dollars that disappear into an underground cannabis economy" and led efforts to regulate the industry, develop systems to "track and trace" all marijuana in California, and develop legal banking mechanisms for marijuana businesses.

Treasurer Ma has been a licensed CPA in California since 1992 and holds a Bachelor's Degree in Accounting from the Rochester Institute of Technology (NY), a Master's Degree in Taxation from Golden Gate University (SF), and an MBA from Pepperdine University.

She is a Member of the California Society of Certified Public Accountants, serves on the Board of California Women Lead, is an Honorary Chair and Spokesperson for the San Francisco Hepatitis B Free Campaign, and is a member of the Screen Actors Guild. She is married to Jason Hodge, a full-time firefighter and Oxnard Harbor Commissioner.

Evan Weiss, Director, PEL Analytics



Evan S. Weiss, Director of PEL Analytics, specializes in the crafting and execution of comprehensive development and recovery plans for governments, businesses and non-profits. He has overseen significant recovery efforts throughout the Mid-Atlantic for cities, states, and school districts. He helped prevent two multi-billion dollar Chapter 9 municipal bankruptcies, restored hundreds of millions in pension assets to solvency, and participated in public asset restructurings in nearly every sector. First with Senator Cory Booker, Evan has been working closely on all aspects of the Opportunity Zone program since its inception, helping design the allocation formula for New Jersey and providing guidance across the Mid-Atlantic, Midwest, and New England to a variety of stakeholders; he continues to provide in depth support to federal officials, governors, mayors, economic development experts, and investors across the United States. Evan has facilitated the formation of several place-based and sector specific Qualified Opportunity Funds, focused on infrastructure, school construction, and workforce housing, as well as higher education and philanthropic partnerships. He recently published with Bruce Katz the first major policy whitepaper on Opportunity Zones: *From Transactions to Transformation: How Cities Can Maximize Opportunity Zones*.

Marisa Raya, Special Projects, Economic & Workforce Development, City of Oakland



Marisa Raya is the Special Projects lead and Business Development Specialist for the Economic & Workforce Development Department at the City of Oakland, where she managed the creation of the City's first adopted Economic Development Strategy in 20 years. In 2017, she formed the Oakland Startup Network in partnership with Oakland's Kapor Center to support people of color and women of all races to launch and scale tech startups. She is a former Regional Planner with the Association of Bay Area Governments, part of the team that created *Plan Bay Area*, the Bay Area's first long-range plan integrating land use and transportation, and led the regional *Development Without Displacement* project. Ms. Raya was the founding administrator for the Program on Human Rights and Justice at MIT, an interdisciplinary program that promoted a human rights-based approach to international development. She has a Masters in Spatial Planning from the Royal Institute of Technology in Stockholm, Sweden, and a BA with honors from Columbia University.

Nathan Donato-Weinstein, Senior Executive Analyst, City of San Jose's Office of Economic Development



Nathan Donato-Weinstein is a senior executive analyst in the City of San Jose's Office of Economic Development, which leads the city's economic strategy, recruits employers, provides workforce development services, manages city real estate, and supports the arts. Nathan primarily works on business recruitment and retention, while using economic and real estate data to better inform policies and decision-making. Before joining the City, he was a reporter covering commercial real estate for the Silicon Valley Business Journal. Nathan is also on the board of CREW Silicon Valley.

Introducing Special Guests

Dana Lanza, CEO, Confluence Philanthropy, and Confluence Board Member



Dana launched Confluence Philanthropy in August of 2009 after serving as the executive director of the Environmental Grantmakers Association (EGA). While at EGA, Dana provided networking services to over 250 grantmaking organizations from across North America and Europe.

From 2009-2011 Dana served as the Program Director and Board Advisor at The Swift Foundation while launching Confluence. Prior to Philanthropy, Dana founded Literacy for Environmental Justice (LEJ), an environmental education and youth empowerment organization for at risk youth. While there, she acted as a lead organizer in the closure of San Francisco's infamous Hunters Point Power Plant; raising funds to supplant it with the region's first off-the-grid educational Eco Center. She has been a

fellow at the Donnell Meadows Program in Systems Theory and the California Women's Foundation Policy Institute.

Dana has also lived and worked among the Samburu (Maasai) in northern Kenya for many years; the Cheyenne River Lakota; and Roma refugees in Europe.

Cross-sector Strategies for Engaging with Opportunity Zones

Greg Nelson, Strategy and Operations, Parker Media LLC / Parker Foundation (Moderator)



Greg Nelson leads strategy and operations for the Parker Foundation and Parker Media, a family office with direct investments in technology, life sciences, and real estate, including an effort to ensure adoption and impact in Opportunity Zones across the country. He also serves on the investment advisory committee for several incubators and funds, and is a Fellow for the Aspen Institute's Future of Work Initiative. Greg spent six years at the Obama White House on the economic policy and clean energy teams. During his tenure at the White House, his policy portfolio included international trade, US participation in the G7 and G20, infrastructure, technology, clean energy, and entrepreneurship. He was also the chief of staff at the National Economic Council for director Gene Sperling, the deputy director of the White House Office of Public Engagement, and the deputy director of the President's Council on Jobs and Competitiveness. Prior to the White House, Greg helped build and sell a technology company, developed startups in energy and biomaterials, and consulted for businesses, nonprofits, and foundations. He holds a BA in political science and history from Yale University.

Fran Seegul, Executive Director, U.S. Impact Investing Alliance



Fran Seegull is the Executive Director of the U.S. Impact Investing Alliance. The Alliance works to increase awareness of impact investing in the United States, foster deployment of impact capital across asset classes globally, and partner with stakeholders, including government, to build the impact investing ecosystem.

Seegull was the Chief Investment Officer at ImpactAssets where she headed investment management for The Giving Fund—an impact investing donor advised fund. Seegull also oversaw product development and managed the Global Sustainable Agriculture and Microfinance Plus Notes.

Previously, Seegull was Managing Director at Funk Ventures, an early-stage impact venture capital firm. She also served as Vice President of Business Development at Novica, an online retailer of products made by artisans in developing economies.

Seegull has a BS in Economics from Barnard College and an MBA from Harvard Business School. She serves on the Investment Committee of Align Impact and on the Investment Advisory Committee of RSF Social Finance. She tweets at [@franseegull](https://twitter.com/franseegull).

Frank Altman, CEO, Community Reinvestment Fund USA



Frank Altman is CEO for Community Reinvestment Fund, USA. As CRF's founder, Altman pioneered the development of a secondary market for community and economic development. Since 1988, under Altman's leadership and in partnership with a network of local community partners, CRF has funded over \$2.4 billion in loans to job-creating small businesses, nonprofits, charter schools and affordable housing projects in 49 states plus the District of Columbia and more than 1,000 communities across the United States. Altman helped design the creation of a federal tax credit to encourage private investment in low-income communities and is a founding member and first President of the New Markets Tax Credit Coalition. He is also a member of the Center for Community Development Investors at the Federal Reserve Bank of San Francisco and an advisor to the Social Innovation Initiative at Brown University. His work has been featured in Inc. Magazine, where he was named one of its Entrepreneurs of the Year and he received Fast Company's Social Capitalist award. More recently Altman has been awarded the Economic Development Innovation Award from GIS Planning Inc. and fDi Intelligence for his contribution to the field of economic development. Altman is a Senior Fellow at Ashoka, the world-wide network of social entrepreneurs.

Nickolas Silbergeld, Senior Investment Officer, Calvert Impact Capital



Nick Silbergeld is on the Investments team at Calvert Impact Capital, a non-profit investment fund that raises capital through its Community Investment Note, and invests with mission-driven organizations worldwide that work to solve social and environmental issues. Nick is focused on deal origination and portfolio monitoring, covering a variety of sectors including affordable housing, community development and real estate, education, and health. Prior to joining Calvert Impact Capital, he worked in Central America overseeing field operations for a sustainable agroforestry project and subsequently managing operations and community engagement for an ecotourism company. Nick has also held a variety of roles in the real estate capital markets, including working for J.P. Morgan in the commercial mortgage securities group, advising fixed income investors on real estate credit risks, and with a boutique real estate firm arranging capital and advising on distressed situations.

David Bank, CEO & Editor, Impact Alpha (Moderator)



David Bank is the CEO and editor of ImpactAlpha, "Investment news for a sustainable edge." ImpactAlpha serves investors and entrepreneurs who generate financial returns through social and environmental value. The Brief, ImpactAlpha's daily newsletter, has become the go-to source for the growing community of "Agents of Impact." As a reporter for The Wall Street Journal, David covered software, cybersecurity and philanthropy. His book about Microsoft, "Breaking Windows" (Free Press, 2001), was named one of the best business books of the year by Harvard Business Review and [Amazon.com](https://www.amazon.com). As vice president of [Encore.org](https://www.encore.org), he developed campaigns around encore careers, second acts for the greater good. A Nieman Fellow at Harvard University, David is a graduate of Columbia Journalism School and UC Santa Cruz.

Jennifer Collins, Fellow in Residence, Beeck Center for Social Impact + Innovation Georgetown University



Jennifer Collins is a Fellow-in-Residence at the Beeck Center for Social Impact + Innovation focused on Opportunity Zones, the federal, bipartisan effort to encourage investors to focus on economically distressed areas and drive capital to communities in a way that truly benefits the individuals and families that currently live and work there.

A purpose-driven leader who has created a platform for success across a wide range of focus areas including real estate, hospitality, education, humanitarian and wellness initiatives, Jen has spent the majority of her career working on the principal ownership side of commercial real estate. Most recently she led the asset management group at LaSalle Hotel Properties, a leading multi-operator real estate investment trust. Prior to joining LaSalle, Jen was at Westbrook Partners, a global real estate private equity firm based in New York City. Jen joined Westbrook from Tishman Hotel & Realty.

Jen brings a background and passion for partnerships in low-income communities in addition to her wealth of experience in real estate investing. She is involved with various youth empowerment initiatives in East Africa where she is increasing educational opportunities for orphans and street children in rural communities through holistic community development. She is also a certified yoga and mindfulness instructor and co-founded a community program in the Anacostia neighborhood of Washington DC. Jen is a graduate of Cornell University's School of Hotel Administration, where she was a member of the Women's Varsity Basketball team.

Bryan Locascio, Senior Associate, Tideline



Bryan Locascio is a Senior Associate at Tideline, a consulting firm that provides tailored advice to clients developing impact investing strategies, products, and solutions. Based in Tideline's San Francisco office, Bryan has contributed to strategy development and implementation for a range of clients since Tideline's inception in 2014, including large institutional foundations, wealth management firms, institutional investors, investment managers, and community and international development finance institutions. Many of his recent projects have centered around working with asset owner and fund manager clients to develop rigorous but practical impact management & measurement systems that build upon existing and emerging best practices in impact investing. Bryan has also contributed as an author to various custom research and thought leadership projects at Tideline.

Prior to Tideline, Bryan worked as an Associate in Legal & Compliance at Scout Capital Management, and before that, as a foreclosure prevention counselor through the New Sector Alliance AmeriCorps Residency in Social Enterprise fellowship. Bryan holds an A.B. from the Woodrow Wilson School of Public and International Affairs at Princeton University.

Sara Olsen, CEO, SVT Group



The idea that one day all investors could understand not only their financial return on investment but also their social ROI was the impetus for Sara Olsen to found [SVT Group](#), the first impact management firm, in 2001. SVT is a “best for the world” certified [B Corporation](#) that designs and implements systems to measure, manage and communicate social and ecological impact, and use this to identify direct streams of previously hidden value for client organizations. SVT systems have assessed the social and environmental value of over \$9Bn in assets for clients including Yo Yo Ma, Ciudad Saludable, Beneficial State Bank, and CalPERS’ Environmental Investment Advisor.

Recognized twice as one of America’s Most Promising Social Entrepreneurs by [Bloomberg Businessweek](#) for her work defining and growing the impact management discipline, Sara has directly trained over 6500 individuals in impact management skills; is methodology co-chair for [Social Value International](#), “the professional home for people working to change the way society accounts for value”; and is founding board member of [Social Value United States](#), its US chapter. She has served as Social

Value International’s delegate to the [Impact Management Project](#) and Social Value US’s delegate to the Global Steering Group, the successor organization to the G8’s initiative on impact investing and impact measurement. Sara is also the co-founder of the [Global Social Venture Competition](#).

Aurelle Amram, Manager, Third Sector Capital Partners, Inc.



Aurelle Amram is a Manager at Third Sector, a nonprofit consulting firm accelerating America’s transition to a performance-driven social sector. Third Sector collaborates closely with governments, community-based organizations, funders, and impact investors to better tie the way that resources are allocated to the achievement of meaningful outcomes. Based out of San Francisco, Aurelle is currently leading Third Sector’s engagement with LA County’s Department of Mental Health, fundamentally transforming the way that the County delivers \$168M+ of annual mental health services to almost 20,000+ individuals with mental illness who may also be experiencing homelessness, justice involvement, or who are frequent users of emergency services. Aurelle also leads Third Sector’s work on Opportunity Zones, providing thought leadership on how stakeholders nationally can remain accountable to the social impact promise of the legislation. Aurelle holds an M.B.A. from the MIT Sloan School of Management, and graduated summa cum laude from New York University with joint B.A.’s in Economics and Sociology and a minor in French. Prior to joining Third Sector, Aurelle worked at NERA Economic Consulting in New York City.

Daniel Palmer, Operations Lead, Blueprint Local



Daniel Palmer leads operations for [Blueprint Local](#), a new venture that aims to be the premier platform for people to invest meaningfully in their own community. Blueprint is curating a series of place-based community investment prospectuses that combine real estate and operating businesses, using the Opportunity Zone benefit to focus these efforts on economically distressed areas. Prior to launching Blueprint Local, Daniel led the national expansion of Startup in Residence, a program that matches local government teams with entrepreneurs to solve civic problems. He has also managed local government innovation projects in South Bend, Indiana, and worked as a strategy and operations consultant.

Background on Opportunity Zones:

In the 2017 tax reform, included was a new bipartisan provision, the Investing in Opportunity Act, that called for state governors to designate a portion of their state’s low-income community census tracts as Opportunity Zones. As of April 9th, designations of Governor Brown’s office were approved where now the Treasury and IRS recognizes 879 finalized Qualified Opportunity Zones (QOZs) for California. The Opportunity Zone incentive, designed to encourage dollars to move off of the sidelines and participate in community development for underserved communities, designated as QOZs, promotes equity investment in business, infrastructure, and real estate by offering federal tax incentives for investors while supporting community access to capital via Qualified Opportunity Funds (QOFs).