

# Yale Conservation Finance Boot Camp

## Course Agenda

### Day 1: Monday, June 2 – Context, Introductions, Terms and Framework for Analysis

11:00 - 11:30 am	Shuttle/Walk from Hotel	<b>Picking up:</b> Courtyard Marriott, 30 Whalley Ave., New Haven <b>Going to:</b> F&ES, Kroon Hall, 195 Prospect St., New Haven  <u>Drivers:</u> Matthew Bare
11:30 - 12:00 pm	Kroon Hall, 3 <sup>rd</sup> Floor Café	<b>Welcome</b>  <u>Speaker:</u> Brad Gentry, Center for Business & the Environment at Yale
<b>Part 1: Introduction to Conservation Finance</b>		
12:00 - 1:30 pm	Session 1 - <b>Lunch</b>  Kroon Hall, 3 <sup>rd</sup> Floor Café	<b>Layering Different Types of Finance</b>  <u>Lunch Speaker:</u> Mark Ackelson, Iowa Natural Heritage Foundation
1:30 - 2:30 pm	Session 2  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Introductions and Review of Camp Schedule and Participant Projects</b>  <u>Presenter:</u> Brad Gentry
2:30 - 2:45 pm	Break	
2:45 - 4:15 pm	Session 3  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Investor Perspectives: Financing Terms &amp; Concepts/The Cost of Money Framework</b> <i>Project planning and budgeting/Assessing financial risks and returns/Sources and uses of grants, debt and equity</i>  <u>Presenter:</u> David Hoffer, Lyme Timber; Brad Gentry
4:15 - 4:30 pm	Break	
4:30 - 6:15 pm	Session 4  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>The Range of Innovative Funding Strategies &amp; What's Working For You?</b> <i>Identifying innovative sources &amp; class discussion of successful attendee strategies</i>  <u>Presenters:</u> Story Clark, Conservation Consulting; Brad Gentry
6:15 - 6:30 pm	Break ( <i>walk to Sage Hall, Bowers Auditorium</i> )	
6:30 - 8:30pm	Session 5 - <b>Dinner</b>  Evans Hall, Beinecke Room 165 Whitney Ave.	<b>Conservation Finance</b> <i>State of the art, and where to get greater leverage</i>  <u>Presenter:</u> Ernest Cook; Knobloch Foundation & Trust for Public Land
8:30 pm	Shuttle/Walk to Hotel	

**Homework:** Rank the five projects on which you would most like to work throughout the week. The rankings will be used to assemble five work teams of four people each for the group projects.

**Day 2: Tuesday, June 3 – “Funders”**

7:00 – 7:30 am	Shuttle/Walk from Hotel	
7:30 - 8:00 am	<b>Continental Breakfast</b> Kroon Hall, 3 <sup>rd</sup> Floor Room 319	Please submit your homework on the rankings of the five projects on which you would like to work.
8:00 - 8:30 am	Announcements, Comments, and Questions	
<b>Part 2: Public Funding for Conservation</b>		
8:30 - 10:00 am	Session 1 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Public Funding &amp; New Federal-Private Partnerships</b> <i>Trends, Underutilized Funding Opportunities/ Buffer Programs</i>  <u>Presenters:</u> Girair Simon, Department of Defense; Alan Front, Conservation Pathways
10:00 - 10:30 am	Break	
10:30 - 12:00 pm	Session 2 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>The New Farm Bill</b>  <u>Presenters:</u> David White, Ecosystem Services Exchange
12:00 - 1:00 pm	Session 3 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Land Conservation and Agriculture</b> <i>Strategies For Participation &amp; Funding</i>  <u>Presenters:</u> Fred deLong, Willistown Land Conservancy
1:00 - 1:15 pm	Break ( <i>walk to Kroon Hall, Ground Floor, Room G-01</i> )	
1:15 - 2:15 pm	<b>Lunch</b> - Session 4 Kroon Hall, Ground Floor Room G-01	Open time  Announcement Of Selected Projects: Please sit with your project team so that you can discuss your project's background, context & possible funding strategies.
2:15 – 3:15 pm	Session 5 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Funding for Restoration: FEMA, State Clean Water Revolving Funds, and More</b>  <u>Presenters:</u> Mark Ackelson
3:15 – 4:15 pm	Session 6 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Panel: Payments for Ecosystem Services – Carbon Markets and Wetland Mitigation Banking</b> <i>Private sector and land trust perspectives</i>  <u>Presenters:</u> Peter Stein; Chris Pryor, New England Forestry Foundation; David Hoffer
4:15 – 4:30 pm	Break	
4:30 – 6:00 pm	Session7 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Building Coalitions For Local Ballot Initiatives</b> <i>New Strategies For Ballot Success in a New Era</i>  <u>Presenters:</u> Ernest Cook, The Trust for Public Land; Mark Ackelson
<b>Part 3: Philanthropic Funding for Conservation</b>		
6:00 - 6:30 pm	Kroon Hall, 3 <sup>rd</sup> Floor Knobloch Environment Center	Cocktails in Knobloch Environment Center (Couch area)
6:30 - 8:30 pm	Session 8 - <b>Dinner</b> Kroon Hall, 3 <sup>rd</sup> Floor Café	<b>Major Donor Fundraising</b> <i>Making The Most Of This Opportunity</i>  <u>Presenters:</u> Forrest Berkley, Funder, Yale Conservation Finance Camp; Tally Blumberg, Open Space Institute
8:30 pm	Shuttle/Walk to Hotel	

**Day 3: Wednesday, June 4 – New Sector Collaborations for Conservation and Funding**

7:30 - 8:00 am	Shuttle/Walk from Hotel	
8:00 - 8:30 am	<b>Continental Breakfast</b>	Open Breakfast
8:30 - 9:00 am	Kroon Hall, 3 <sup>rd</sup> Floor Café	Announcements, Comments, and Questions
<b>Part 4: New Sector Partnerships for Conservation</b>		
9:00 - 10:00 am	Session 1 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>A Community-based Land Trust</b> <i>Dedicated to community health, agriculture &amp; economic development</i>  <u>Presenter:</u> Jonathan LaBonte, Androscoggin Land Trust
10:00 - 11:00 am	Session 2 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Land Conservation and Health</b> <i>Partnering with the health sector on community initiatives &amp; funding</i>  <u>Presenters:</u> Wendy Jackson, Freshwater Land Trust
11:00 - 11:30 am	Break (walk to Ground Floor, Room G-01)	
11:30 - 1:00 pm	Session 3 – <b>Lunch</b> Kroon Hall, Ground Floor Room G-01	Open lunch
1:00 - 1:15 pm	Break (walk to 3 <sup>rd</sup> Floor, Room 319)	
1:15 – 2:45 pm	Session 4 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Land Conservation and Water</b> <i>Funding For Watershed Protection</i>  <u>Presenters:</u> Story Clark; Caitlin Burke, Conservation Trust for North Carolina
2:45 – 4:15 pm	Session 5 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Land Conservation and Economic Development</b>  <u>Presenters:</u> Peter Stein; Lucas St. Clair, Quimby Family Foundation; Joe Short, The Northern Forest Center
4:15 - 4:30pm	Break	
4:30 - 5:45pm	Session 6 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Deal Doctor: Group &amp; Individual Project Challenges</b> <i>Bring your individual and group project questions to a master dealmaker &amp; participate in an open discussion</i>  <u>Moderators:</u> Peter Stein; Brad Gentry; Story Clark
5:45 - 6:30 pm	Tour of Evans Hall & LEED Platinum Kroon Hall (meet on ground floor of Kroon Hall) <i>Tour Guide:</i> Eugenie Gentry, Yale University	
6:30 - 6:45pm	Break (walk to Yale Sustainable Farm, 345 Edwards St.)	
6:45 - 8:30pm	<b>Dinner</b> Yale Sustainable Farm 345 Edwards Street	Fresh wood oven baked pizza and tour of the Yale Sustainable Farm  Short talk by: Mark Bomford, Director, Yale Sustainable Food Project and Jacqueline Lewin, Coordinator, Yale Sustainable Food Project
8:30pm	Shuttle/Walk to Hotel	

**Day 4: Thursday, June 5 – Financing & For-Profit Initiatives for Conservation**

7:00 - 7:30 am	Shuttle/Walk from Hotel	
7:30 - 8:00am	Kroon Hall, 3 <sup>rd</sup> Floor Café	Open Breakfast
8:00 - 8:30am		Announcements, Comments, and Questions
<b>Part 5: Financing &amp; For-Profit Initiatives for Conservation</b>		
8:30 – 10:00 am	Session 1  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Borrowing Money: : Revolving Funds, PRIs, Banks &amp; More</b> <i>How, why and where to borrow money</i>  <u>Presenters:</u> Reggie Hall, The Conservation Fund
10:00 - 10:15 am	Break	
10:15 – 11:30am	Session 2  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Introduction to Sources of Private Funding</b> <i>Mapping the Conservation Investment Landscape</i>  <u>Presenters:</u> Peter Stein, Brad Gentry
11:30 - 11:45 am	Break ( <i>walk to Kroon Hall, Ground Floor, Room G-01</i> )	
11:45 - 1:15 pm	Session 3 - Lunch  Kroon Hall Ground Floor, Room G-01	<b>Mission Related Investing: An individual’s Perspective</b>  <u>Presenter:</u> Jesse Fink, Betsy and Jesse Fink Foundation/Mission Point Capital  <i>Presentation (11:45 am – 12:45 pm)</i>
1:15 - 1:30 pm	Break ( <i>walk to Kroon Hall, 3<sup>rd</sup> Floor, Room 319</i> )	
1:30 - 2:30 pm	Session 4  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Institutional Investing</b> <i>New Products, New Opportunities</i>  <u>Presenter:</u> Peter Stein
2:30 - 4:00 pm	Session 5  Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Wrap-up Discussion</b>  <u>Presenters:</u> Peter Stein; Story Clark; Brad Gentry
4:00 - 5:45 pm	Yale Campus Walking Tour (Ending at Yale Bookstore in Downtown New Haven for shopping) or Shuttle/Walk to hotel	
5:45 pm	Walk to hotel from Yale Bookstore	
6:00 - 8:00 pm	<b>Dinner</b> Courtyard Marriott Banquet Room	Working Dinner: Attendees work on Camp Projects

**Day 5: Friday, June 6 – Presentation of Project Results and Discussion of Next Steps**

7:00 - 7:30 am	Shuttle/Walk from Hotel	
7:30 - 9:00 am	<b>Continental Breakfast</b> Kroon Hall, 3 <sup>rd</sup> Floor Café	Working Session on Finalizing Projects
9:00 - 10:00 am	Session 1 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Presentations Round 1 - Two Project Groups Present &amp; Discuss</b>
10:00 - 10:30 am	Break	
10:30 - 12:00 pm	Session 2 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Presentations Round 2 - Three Project Groups Present &amp; Discuss</b>
<b>Part 6: Conclusion and Next Steps</b>		
12:00 - 12:45 pm	Session 3 Kroon Hall, 3 <sup>rd</sup> Floor Room 319	<b>Conservation Finance Network, Concluding Thoughts &amp; Q&amp;As</b>  <i>Presenter:</i> Leigh Whelpton <i>Moderators:</i> Brad Gentry, Story Clark, Peter Stein
12:45 - 2:00 pm	<b>Lunch</b> Kroon Hall, 3 <sup>rd</sup> Floor Café	<b>Presentation of Course Certificates, Take-Home Ideas, Informal Discussion, and Evaluations</b>
2:00 pm	Shuttle/Walk to Hotel	

**Additional Information**

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**Primary Contact** (for any logistics problems or questions during the week 24/7)

Amy Badner: (203) 535-2754; amy.badner@yale.edu

**Kroon Hall** (unless otherwise noted, all events take place here)

195 Prospect St.

New Haven, CT 06511

**Courtyard Marriot**

30 Whalley Ave.

New Haven, CT 06511

203-777-6221

**Taxi Services**

Metro Taxi New Haven: (203) 777-7777

**Shuttle Drivers:**

TBD – Cell:

**Metro North** (commuter train from New Haven Union Station to NYC Grand Central Terminal, apx. 1 hr 45 min)

Schedule: [http://as0.mta.info/mnr/schedules/sched\\_form.cfm](http://as0.mta.info/mnr/schedules/sched_form.cfm)

