NISE!

NATIONAL INSTITUTE FOR A SUSTAINABLE ECONOMY



21st Century Economy Business Summit

October 26, 2011
7:45a - 12:15p

Federal Reserve Bank of Boston

Connolly Center - Fourth Floor

Welcome!

We are delighted that you have joined us today to participate in an important conversation about sustainability, its role in the future of our economy and the prosperity of Americans across the country. We have terrific Speakers and Conversation Leaders to help us begin the conversation, but we want to hear your voice as well. Please ask questions during the Q & A sessions and help us learn from each other.

The objective of this 21st Century Economy Business Summit is to share how companies large and small are re-inventing themselves to make sustainable business practices part of their corporate DNA to increase their competitiveness and obtain a triple bottom line measured in profitability, social equity and environmental sustainability. When you leave here today, we want you to do the same. Share it with other members of your business, your business associates and your friends. We want you to become Conversation Leaders about sustainability as well. That's how we will begin to change our future and make America prosperous once again.

Ed Dugger and Crystal Johnson
NISE!

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Summit Schedule

7:45 am – 8:15 am **Networking & Continental Breakfast Reception**

8:15 am – 8:45 am **Welcome Ceremony**

Leaders for a Sustainable Business Community

NISE! Welcome:

- **Crystal Johnson,** *Managing Director, NISE!*
- **Edward Dugger III,** *CEO, NISE!*

Speakers:

- **JD Chesloff,** *Executive Director, Massachusetts Business Roundtable*
- **Andy Tarsy,** *President, Progressive Business Leader Network*

8:45 am – 10:15 am **Panel Perspective 1**

What Business Models are Contributing to a Sustainable 21st Century Economy?

A discussion with business executives in the forefront of creating new business methods, relationships and rules that support a triple bottom line: profitability, social equity and ecological sustainability. The purpose of the discussion is to provide the audience with new insights into the values, priorities, and strategies of businesses pursuing sustainability that are achieving the scope, scale and success required to drive change.

Conversation Leaders:

- **Carolyn Kaplan,** *CSO, Nixon Peabody - Moderator*
- **Gary Hirshberg,** *CEO, Stonyfield Farm, Inc.*
- **Laury Hammel,** *CEO, The Longfellow Clubs*
- **Tim Healy,** *CEO, EnerNOC*

Q & A

10:15 am – 11:45 am **Panel Perspective 2**

The Role of Impact Investing in a Sustainable Economy: The Business Case

Learn about innovative investment practices that consider environmental, social and corporate governance criteria to generate long-term competitive financial returns and positive societal impact. A panel discussion on how market participants can best position themselves for a strong financial performance in a new market environment. Benefit from practical guidance, expertise and successful showcases from leading edge financial and business leaders.

Conversation Leaders:

- **Georgette Wong,** *CEO, Take Action! Impact Investing - Moderator*
- **Farha-Joyce Haboucha,** *Managing Director, Rockefeller & Co., Inc.*
- **John LaPann,** *President & Chief Investment Officer, Federal Street Advisors*
- **DeWitt "Dick" Jones,** *Executive Vice President, Boston Community Capital*

Q & A

11:45 am – 12:00 am **NISE! Award Ceremony**

NISE! will acknowledge and honor an individual and/or business with an award for creating pathways to a sustainable future.

Introduction of Award and Award Recipient

- **Edward Dugger III**

12:00 am – 12:15 pm **Closing Ceremony**

Speaker:

- **Tedd Saunders,** *President, EcoLogical Solutions; CSO, The Saunders Hotel Group*

Closing Remarks:

- **Edward Dugger III and Crystal Johnson**

Speakers and Conversation Leaders

JD Chesloff, Executive Director, Massachusetts Business Roundtable

JD has worked in and around Beacon Hill for more than 20 years. In the Legislature, he was the Chief of Staff to the House Committee on Commerce and Labor, and was the education issues analyst and Deputy Budget Director for the House Committee on Ways and Means. JD also worked as the Legislative Director for State Treasurer Shannon O'Brien and then as Issues Director for the O'Brien-Gabrieli gubernatorial campaign in 2002. He joined MBR in 2004 after serving as Legislative/Issues Director for the Early Education for All (EEA) Campaign, where he was responsible for developing and driving legislative support for EEA's legislation and agenda which included the creation of the Massachusetts Department of Early Education and Care.

Farha-Joyce Haboucha, Managing Director, Director of Socially Responsive Investments, Rockefeller & Co., Inc.

Farha-Joyce Haboucha, CFA, is the Senior Portfolio Manager and Director of Sustainability and Impact Investments within the Investment Group and a Managing Director of Rockefeller Financial. Before joining Rockefeller, she spent ten years as a Senior Portfolio Manager and Co-Director of Socially Responsive Investment Services at Neuberger & Berman. She also was with Manufacturers Hanover Trust as a Vice President and Group Head of the Personal Trust Investment, Private Banking and Securities Division, and served at Union Trust Company as a Senior Investment Officer, Portfolio Manager, and Manager of Research. She is past Chairman of the Social Venture Network and for16 years, until 2008, she served on the Investment Committee of the United Methodist Church. She has also served on the boards of FTSE4GOOD USA Advisory Committee and several non-profit organizations

Laury Hammel, CEO, The Longfellow Clubs

Laury Hammel founded The Longfellow Clubs in Wayland, Sudbury, Natick, and Franklin, MA in 1980. He manages his group of health and sports clubs, holistic health centers, children's centers, and camps that serve 10,000 members and is the 54th largest health club business in the US with $16 million in annual revenues. Longfellow is an industry leader in innovative business practices, social and environmental responsibility, and community service. Laury founded the Handi-Racket Tennis Program, a tennis program for children and adults with special needs. He also served on a pro bono basis, as the Executive Director, Sportsmen's Tennis Club, an inner city tennis club teaching young people tennis and life skills. In 1988, he founded the New England Businesses for Social Responsibility (NEBSR) now known as the Sustainable Business Network of Greater Boston (SBN). In 1991 he founded Business for Social Responsibility (BSR). In 2001, Laury co-founded the Business Alliance for Local Living Economies (BALLE).

Tim Healy, CEO, EnerNOC

Tim has guided EnerNOC's strategic course since its inception in 2001. Under Tim's leadership, EnerNOC has experienced exponential growth in size, capacity, and revenue. EnerNOC also expanded into new markets across the United States and diversified its solutions portfolio from demand response to other energy management solutions including energy efficiency and energy procurement services. In 2007, he led EnerNOC's initial public offering, which was named IPO of the Year by the Association for Corporate Growth Boston and Mass High Tech magazine, and received the Ernst & Young Entrepreneur of the Year Award in New England. Today, EnerNOC is a premier full-service energy management provider with unparalleled performance and services.

Gary Hirshberg, CEO, Stonyfield Farm, Inc.

Gary Hirshberg is the husband of writer Meg Hirshberg and the father of three yogurt eaters. He is President, and CE-Yo of Stonyfield Farm, the world's leading organic yogurt producer, and the author of **Stirring It Up: How to Make Money and Save the World** (Hyperion, 2008). Since 1983, Gary has overseen Stonyfield's growth, from its infancy as a seven-cow organic farming school to its current $370 million in annual sales. Stonyfield has enjoyed a compounded annual growth rate of over 23% for more than 19 years, by consistently producing great-tasting products and using innovative marketing that blends the company's social, environmental, and financial missions. Stonyfield entered into a partnership with Groupe Danone in 2001, and Gary is now Managing Director of Stonyfield Europe, with organic brands in Canada, Ireland, and France.

DeWitt Jones, Executive Vice President, Boston Community Capital

DeWitt (Dick) Jones is Executive Vice President of Boston Community Capital and President of BCC's Boston Community Managed Assets and BCC Solar Energy Advantage (SEA) affiliates. He has served as a member of BCC's leadership team since it was established in 1984 and is also a director of the Boston Community Venture Fund and Boston Community Loan Fund. Dick leads and oversees

BCC's sustainable development activities, including its Energy Advantage Program, renewable energy initiatives under SEA, and the Green Building Production Network. Under his leadership, SEA has developed approximately 1.4 megawatt of PV capacity on affordable housing developments across Massachusetts, representing a 17% increase in total solar PV capacity in the state. SEA is the largest solar PV power purchase provider for affordable housing in Massachusetts.

Carolyn Kaplan, Chief Sustainability Officer, Nixon Peabody

Carolyn Kaplan serves as Chief Sustainability Officer for Nixon Peabody, the first such position in a law firm. In that role she identifies opportunities to better service and partner with clients and others on joint sustainability initiatives and she works closely with the firm's Green Operations Steering Committee to implement sustainable practices and reduce the firm's carbon footprint. Carolyn is the former co-chair of the Renewable Energy Team in the firm's Energy and Environmental practice group. She has assisted clients on a variety of renewable energy projects, including siting of land based and offshore wind energy facilities. Carolyn concentrates her practice on land use and environmental matters.

John LaPann, President and Chief Investment Officer, Federal Street Advisors

John LaPann brings more than 30 years of high level investment and planning experience to his role as president and chief investment officer of Federal Street Advisors, an investment consultancy serving ultra high net worth individuals, families and foundations. John also chairs the firm's Investment Committee. He and his firm sit at or near the top of almost every national ranking of RIAs, including Barron's, Financial Advisor magazine and AdvisorOne, a top industry website for news and commentary. As one of the country's top RIAs, John speaks out frequently on topics that include socially responsible and mission-related investing, and alternative investments among others. Federal Street Advisors has been a long-time leader in promoting mission related investing and in developing the industry's ability to address both performance and mission objectives.

Tedd Saunders, President, EcoLogical Solutions; CSO, The Saunders Hotel Group; Co-Owner, Lenox Hotel and Comfort Inn & Suites Boston/Airport

Often credited with pioneering luxury urban ecotourism worldwide in 1989, Mr. Saunders is recognized for creating game-changing environmental models for travel and tourism – the world's largest service sector industry. He is now engaging major national chains through their franchise properties. In 1992 Mr. Saunders founded EcoLogical Solutions, which has also advised the White House Conference on Tourism, HRH The Prince of Wales' Business Leaders Forum, Harvard University and Taj Hotels, to name a few. Under his leadership, Saunders Hotel Group has earned many prestigious honors including a U.S. Presidential Gold Medal, Energy Star Partner Of The Year and British Airways' Tourism for Tomorrow awards. Author of **The Bottom Line of Green is Black** (Harper Collins), Tedd speaks internationally to business and political leaders.

Andy Tarsy, President, Progressive Business Leaders Network

Andy is a co-founder and the first professional President and Executive Director of the Progressive Business Leaders Network. He is a proven non-profit leader, business strategy advisor and public policy professional. The vision Andy shares with the PBLN team is to redefine and revitalize the role of business leadership in society, and to help invent a sustainable economy. Andy was previously Executive Director of the Anti-Defamation League of New England and a senior executive with Facing History and Ourselves. Prior to that, Andy was a Trial Attorney in the United States Department of Justice and practiced law with New York's Vladeck Waldman and with the Boston and Manchester, NH offices of Nixon Peabody LLP.

Georgette Wong, CEO, Take Action! Impact Investing Conference Series and CEO, Correlation Consulting

Georgette is the creator and curator of the Take Action! Impact Investing Conference Series and CEO of Correlation Consulting. Now celebrating Correlation's fifth year of catalyzing impact investing, Take Action! is the premier gathering of impact investors focused on premium returns. Georgette is currently performing an institutional asset owner study, in collaboration with the US Department of State and the United Nations-backed Principles for Responsible Investment. She previously assisted the US State Department, the Board of Governors of the Federal Reserve and the Federal Reserve Bank of San Francisco's Center for Community Development Investments on convenings aimed to catalyze impact investing across the government, private and public sectors. Georgette's most recent work has been published in **Community Development Investment Review**, produced by the Federal Reserve Bank of San Francisco, Solutions for Impact Investors: From Strategy to Implementation, produced by Rockefeller Philanthropy Advisors and Financial Planning Magazine.

About NISE!

Genesis

NISE!, the National Institute for a Sustainable Economy LLC, is a for-profit business based in Boston, Massachusetts. NISE! was founded in 2010 in response to President Obama's challenge to the private sector to lead a new era of innovation and growth on the cutting edge of our economy by finding new ways to tackle the intertwined problems of energy and the environment. The founder of NISE!, Edward Dugger III, who was among many from whom the Obama Transition Committees sought advice regarding fresh ideas and policy recommendations, decided to pursue this challenge by establishing NISE!

Mission and Current Business Focus

The NISE! mission is to be a catalyst for translating environmental and social problems into new business solutions that contribute to an equitable and ecologically sustainable economy.

We pursue our mission by identifying a specific need or demand and re-imagine a business model that will address it. We then assemble a team of business collaborators to implement the business model and the resources necessary to compete. Often the NISE! solution will also support the implementation of government policy for which a private sector partner is needed.

For instance, we believe that energy conservation is our nation's most effective strategy for a reduction in the emission of C02 and other greenhouse gases into our atmosphere. Historically business and government have focused primarily on conservation in the industrial and commercial sectors. Energy conservation in the residential sector has lagged due to the perception that the business opportunity is much more limited and requires subsidies to be attractive. NISE! examined the barriers that have prevented homeowners in particular from making their homes more energy efficient and concluded that the business opportunity was very large and what was needed was innovation. That's how why we launched our Energy Conservation Initiative (ECI).

The objective of the ECI is to:

- Provide a comprehensive solution to the obstacles most homeowners confront when considering their options for energy conservation. Other conservation opportunities, and solutions to health hazards within the home are in our pipeline, as well as new financial models for rapidly scaling these solutions.
- Significantly accelerate the rate at which homeowners take effective action to substantially reduce energy consumption.
- Make a major contribution to reducing C02 emissions attributable to the production or consumption of fuels in the state of Massachusetts.
- Engage local businesses in creating skilled green jobs and adopting sustainable business practices that promote economic growth. In addition the NISE! will provide support and strong demand for skilled labor provided by Massachusetts' various training programs focusing on green jobs.

NISE! is Here For You

Re-imagining Business

Let us be NISE! to you. Our experience at re-imagining businesses can serve you too. Here's how:

NISE! for Busines
If you are a business - small or large - that has developed part of the solution to a business problem, but need help putting together the other parts, NISE! can advise you on how to do so and assist you in implementing the new solution.

NISE! for Government
If you are government agency that is responsible for implementing policy and need a partner to help initiate or implement private sector activity that supports it, NISE! can be the catalyst you want.

NISE! New Ideas
If you are in need of new ideas -- as a business or a government agency -- NISE! can brain-storm with you or develop a complete strategic plan that will jump-start a new business or policy initiative.

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