

Conservation Finance Boot Camp

June 5 - June 9, 2023 | Yale School of the Environment

Syllabus

Brought to you by:

The Conservation Finance Network & the Yale Center for Business and the Environment

Day 1: Monday, June 5

11:00am shuttle from hotel available	Transportation <i>Pick up & drop off from:</i> Courtyard by Marriott New Haven at Yale 30 Whalley Ave, Hotel phone: (203) 777-6221	Location <i>Unless otherwise noted, all events take place here:</i> Kroon Hall Burke Auditorium. 195 Prospect Street, 3rd Floor (map)	Primary Contacts <i>For content:</i> - Walker Holmes: (203) 671-6761 <i>For logistics:</i> - Julia Mettler-Grove: (315) 715-1696 - Kathy Hoegler: (914) 715-6629 - Mary Powers: (970) 413-0333 - Katie Michels: (406) 529-6186
Part 1: Introduction to Conservation Finance			
11:00 AM	Shuttle from hotel to Yale School of the Environment, 195 Prospect St.		
11:30 -12:30 PM	Lunch, Welcome, & Review of Camp Schedule Presenters: Julia Mettler-Grove, <i>The Conservation Finance Network</i> ; Walker Holmes, <i>The Trust for Public Land</i> ; Brad Gentry, <i>Yale School of Environment</i>		
12:30 - 1:25	Participant “Rapid Fire” Introductions		
1:30 - 2:30 Session 1	Conservation Finance 101: Trends, Tools, & Experience in the Room *Livestream Session Presenters: Walker Holmes, <i>Trust for Public Land</i> , Brad Gentry, <i>Yale School of Environment</i> ; Leigh Whelpton, <i>CFN (virtual)</i>		
2:30 – 3:00	Break		
3:00 - 4:15 Session 2	Principles of Finance: The Investor’s Perspective *Livestream Session Presenter: David Hoffer, <i>The Lyme Timber Company</i>		
4:15 - 4:45	Break		
4:45 - 5:45 Session 3	Introduction to Project Modeling <i>Wrestling multiple cash flows into a powerful decision tool</i> Presenters: Dominick Grant, <i>Dirt Capital Partners</i>		
5:45 - 6:00	Walk to dinner		
6:00 - 8:00 Session 4	Dinner at School of Management, Beinecke Room Speaker: Dean Indy Burke, <i>Ph.D., Carl W. Knobloch, Jr. Dean, Yale School of the Environment (YSE)</i>		
8:30	Shuttle to Hotel		

Day 2: Tuesday, June 6

7:30 - 8:00 AM	Shuttle from Hotel
8:00 - 8:30	Light Breakfast
Public Funding & Ecosystem Service Markets	
8:30 - 8:45 Session 1	Introduction to Ecosystem Service Markets Presenters: Brad Gentry, Yale School of the Environment
8:45 - 9:15 Session 2	Ecosystem Service Markets: Wetland & Stream Mitigation Presenters: David Hoffer, The Lyme Timber Company
9:15 - 10:30 Session 3	Ecosystem Service Markets: Carbon *Livestream Session Moderator: Sara Kuebbing, Yale Applied Science Synthesis Program Presenters: Travis Croft, The Climate Trust; Nathan Truitt, American Forest Foundation; Liz Johnston, City Forest Credits
10:30 - 11:00	Break
11:00 - 12:00 PM Session 4	Public Funding: Federal Opportunities *Livestream Session Presenter: Alan Front, Conservation Pathways (virtual); Walker Holmes, Trust for Public Land; Peter Howell, CFN
12:00-1:00	Lunch Special Session: Introduction to Gratitude Railroad with Howard Fischer
1:00 - 1:45 Session 5	Participant Project Pitches
1:45 - 2:45 Session 6	Public Funding: Building Coalitions for Local & State Ballot Initiatives <i>Strategies for Ballot Success in a New Era</i> Presenters: Walker Holmes and Honor Lawler, The Trust for Public Land
2:45-3:15 PM	Break
3:15 – 4:30 Session 7	Water Panel: Water funds & municipal partnerships Presenters: Karen Young, Sebago Clean Waters; Margaret Bowman, Bowman Environmental Consulting; Jen Diffley, Culp & Kelly LLP
4:30 - 5:30 Session 8	Borrowing Money <i>How and why to borrow money & a borrower's perspective</i> Presenter: Reggie Hall, LegacyWorks Group
5:30 - 6:00	Shuttle or walk to dinner
6:00 - 8:00 Session 9	Funder Panel Yale Farm Dinner <i>Tapping the full potential of donor and foundation funding</i> Speakers: Tally Blumberg, Open Space Institute, Margaret Bowman, Bowman Environmental Consulting
8:00	Shuttle to Hotel

Day 3: Wednesday, June 7

7:30 - 8:00 AM	Shuttle from Hotel
8:00 - 8:30	Light Breakfast
9:00 - 9:30	Announcements, Comments, and Questions
9:30 - 10:30	<i>*Project teams announced and open time to meet</i>
10:30 - 11:45 Session 1	Equity & Justice at the Confluence of Conservation & Finance Presenters: <i>Dr. Michel Gelobter, The Yale Center for Environmental Justice; Chaka Wade, Black Farmer Fund; Mavis Gragg, HeirShares; Sacha Spector, Doris Duke Foundation</i>
11:45 - 12:00 PM	Break
12:00 - 1:00 Session 2	Policy & Agency Updates <i>Leveraging unconventional partnerships and increased innovation</i> *Livestream Session Presenters: <i>Kari Cohen, Nine Steps Consulting; Jackson Moller, US Forest Service, Erica Rohr, DoD REPI Program</i>
1:00 - 2:30	Lunch
2:30 - 3:30 Session 3	State Revolving Funds & Finance Authorities *Livestream Session Presenters: <i>Peter Stein, The Lyme Timber Company; Shaun O'Rourke, Quantified Ventures (virtual)</i>
3:30 - 5:00 Session 4	Deal Doctor: Group & Individual Project Challenges <i>A "World Café" style open house to allow for consultation on individual and group projects</i> Deal Doctors: <i>Walker Holmes, Trust for Public Land; Peter Howell, The Conservation Finance Network; Reggie Hall, LegacyWorks Group; Peter Stein, The Lyme Timber Company; Spencer Meyer, Independent</i>
5:00 - 5:30	Walk or shuttle to East Rock Brewery
5:30 - 7:30	Dinner at East Rock Brewery
8:00 PM	Shuttle to Hotel

Day 4: Thursday, June 8

7:30 - 8:00 AM	Shuttle from Hotel
8:00 - 8:30	Light Breakfast
8:30 - 9:00	Announcements, Comments, and Questions
9:00 - 10:15 Session 1	<p>Conservation Investing: Who, What, & Why <i>Background & Context on the Conservation Investment Landscape</i></p> <p>*Livestream Session</p> <p>Presenters: Peter Stein, The Lyme Timber Company, Jason Scott, Renewable Resources Group LLC</p>
10:15 - 10:45	Break
10:45 - 11:45 Session 2	<p>Outcomes-Based Financing <i>Different models of upfront capital for performance based outcomes</i></p> <p>Presenter: Seth Brown, Quantified Ventures</p>
11:45 - 12:45 PM Session 3	<p>Conservation Investing: Case Examples</p> <p>Presenters: Matt Singer, Galveston Bay Foundation and Chocolate Bay; Imene Moussa, Credit Suisse and debt conversions for nature; Peter Stein, The Lyme Timber Company</p>
12:45 - 1:45	<p>Lunch <i>Opportunity to meet with project groups</i></p>
1:45 - 2:45 Session 4	<p>State of Play for International Conservation Finance <i>Survey of international approaches and recent trends</i></p> <p>Presenters: David Meyers, The Conservation Finance Alliance</p>
2:45 - 3:00	Break
3:00-3:15 Session 5	<p>Intro to CFN <i>A formal overview of the CFN's other program and resources, open call for collaboration</i></p> <p>Presenter: Julia Mettler-Grove and Mary Powers, The Conservation Finance Network</p>
3:15 - 4:00	<p>Wrap-up Questions & Discussion</p> <p>Facilitators: Peter Stein, The Lyme Timber Company, Walker Holmes, Trust for Public Land, Brad Gentry, Yale School of Environment</p>
4:00-4:15	Group photo on steps of Kroon Hall
4:15 - 6:00	<p>Open</p> <p>*Optional guided walk to Marsh Garden with Katie Michels from 4:15-5:00pm</p>
6:00 - 8:00	<p>Dinner at Sherkaan <i>Working dinner for project teams</i></p>

Day 5: Friday, June 9

7:30 - 8:00 AM	Shuttle from Hotel
8:00 - 8:30	Light Breakfast
8:30 - 8:50	Final Prep for Presentations
8:50 - 9:00	<p>Introduction to the Dolphin Tank</p> <ul style="list-style-type: none"> ● Facilitator: Walker Holmes, Trust for Public Land <p>Dolphins:</p> <ul style="list-style-type: none"> ● Peter Stein, The Lyme Timber Company ● Brad Gentry, Yale School of the Environment ● Spencer Meyer, Independent
9:00 - 10:00	Presentations Round 1 - Project Groups Present & Discuss
10:00 - 10:30	Break
10:30 -12:00 PM	Presentations Round 2 - Project Groups Present & Discuss
Conclusion and Next Steps	
12:00 - 12:30	<p>Concluding Thoughts & Thank Yous <i>Recap of next steps and actions following the course</i></p> <p>Presenters: Peter Stein, The Lyme Timber Company; Julia Mettler Grove, The Conservation Finance Network; Brad Gentry, Yale School of the Environment; Walker Holmes, Trust for Public Land</p>
12:30 - 2:00	<p>Lunch <i>Action Sheet & Evaluation Forms; Course Certificates</i></p> <p>**Please submit your Action Sheet & Evaluation Form before you leave</p>