



**Families and Foundations Investing in Energy Innovation: Texas and Beyond**  
*E-Capital Summit Investment Forum*

**Thursday, April 20, 2017**

Women's Museum  
3800 Parry Avenue, Dallas Fair Park

8:00-9:00      **Networking Breakfast and Registration**

9:00-9:10      **Welcome**

Sarah Kearney, Executive Director and Founder, PRIME Coalition  
Trammell S. Crow, Founder, Earth Day Texas

9:10-9:30      **Cleantech 101: State of the Planet**

Curtis Probst, Managing Director, Rocky Mountain Institute

What is the current status of the planet and our environmental systems? What is the current status of international, national, and state policy in addressing the environmental issues we're facing? How can clean technology address these issues?

9:30-9:50      **Cleantech 102: Why Does Clean Technology Innovation Matter?**

Matthew Nordan, Co-founder and Investment Committee Chairman, PRIME Coalition

Why does innovation matter, and how does it support economic growth? What is the current state of the ecosystem supporting clean technology innovation? What challenges do clean technology innovators face, and how can family offices and philanthropy help fill those gaps?

9:50-10:35      **Cleantech 103: What Counts as Clean Tech?**

David Danielson, Managing Director, Breakthrough Energy Ventures

Interviewed by Matthew Nordan, Co-founder and Investment Committee Chairman, PRIME Coalition

What is clean technology? What are the economic drivers and benefits for investing in clean technology? How can efficiency improve traditional energy industries (ex. energy/water nexus, carbon capture & reuse)? How can new technologies help us achieve clean water, air, food, and energy?

10:35-10:50 Break

10:50-11:25 **Bloom Energy's Story**

Dr. KR Sridhar, Founder, Chairman, and CEO, Bloom Energy

How did Bloom Energy get started? Where is it going? What impact has Bloom Energy already had, and what does it aim to accomplish in the future?

11:25-12:30 **Panel and Group Activity: Tools for Investing in Clean Technologies**

Marilu Hastings, VP Sustainability Programs, Cynthia and George Mitchell Foundation

Joe Speicher, Executive Director, Autodesk Foundation

Dipender Saluja, Managing Director, Capricorn Investment Group

Regine Clement, CEO, CREO Syndicate

Moderated by Alicia Seiger, Deputy Director, Stanford Steyer-Taylor Center for Energy Policy and Finance

What tools/types of capital are available for supporting and investing in clean technologies (e.g. becoming an LP in a VC, direct investment from a family office, impact investment, direct investment of charitable capital, traditional philanthropy)? How have these tools been used in the past, and for what types of technologies/companies are they appropriate? How does direct investing in software vs. business model innovation vs. hardware compare? How can we overcome some of the barriers to investment?

12:30-2:00 Lunch at Earth Day Texas Innovation Expo

2:00-2:15 **DOE Perspective: The Public-Private Interface**

Johanna Wolfson, Director of Technology-to-Market, Office of Energy Efficiency and Renewable Energy, Department of Energy

What is the DOE's role in supporting early stage clean technology innovation?  
How can foundations and families partner with the DOE?

2:15-3:00 **Building a Pipeline**

Nate Gorence, Technology to Market Advisor, Advanced Research Projects  
Agency -- Energy (ARPA-E)

Ilan Gur, Founding Director, Cyclotron Road

Emily Reichert, CEO, Greentown Labs

Moderated by Richard Adams, Director, NREL Innovation and Entrepreneurship  
Center

What types of companies are leading grant programs and clean tech accelerators  
supporting? What financing challenges do clean technology companies face?  
How can families and foundations partner with incubators, accelerators, and  
government programs to build a deal pipeline?

3:00-3:45 **Texas Clean Tech Entrepreneurs**

Etosha Cave, Co-Founder, Opus 12

Aaron Mandell, Co-Founder and Chairman, Quidnet

Amy George, CEO, Earthly Labs

Moderated by Mitch Jacobson, Co-Director, ATI Clean Energy Incubator, UT  
Austin

Meet some of the clean tech entrepreneurs working in Texas today. What  
technologies are they working on and what impact will they have on the  
environment? What should family offices and philanthropists know about  
investing in clean tech from the entrepreneur's perspective?

3:45-4:00 Break

4:00-4:45 **Tesla's Story**

JB Straubel, CTO and Co-Founder, Tesla Motors

How did Tesla Motors get started? Where is it going? What impact has Tesla  
already had, and what does it aim to accomplish in the future? How is Mr.  
Straubel addressing energy issues through his own family office?

4:45-5:25 **Group Activity: Goal Setting**

Nicole Systrom, Director of Philanthropic Partnerships, PRIME Coalition

*Ms. Systrom and other staff members will lead small groups of participants through a reflection and goal setting activity: What surprised you about today? What is missing from the direct investing ecosystem? What is redundant? How can you work together with your fellow participants to increase your direct investments in clean technology? What commitment can you make today to take the next step?*

5:25-5:30      **Concluding Remarks and Call to Action**

6:00-9:00      Maple Banquet at the Hall of State

Following drinks at 6 pm, dinner will be served at 7 pm in the Hall of State (which is a short walk from the Women's Museum on the Fair Park grounds).

### **Friday, April 21, 2017**

Cotton Bowl, 4th Floor Suite  
Dallas Fair Park

8:00-9:00      **Comments by Secretary Rick Perry**

9:00-10:30    **Breakfast Roundtable Powered by U.S. Trust**

Sarbjit Nahal, Managing Director and Head of Thematic Investing, Bank of America Merrill Lynch  
Ken Locklin, Managing Director, Impax Asset Management

11:00-5:00    **Investor Office Hours Facilitated by Austin Technology Incubator**