

2014 San Diego Microfinance Summit Agenda

Joan B. Kroc Institute for Peace & Justice
University of San Diego
April 8th, 2014

- 8:15 – 9:00 AM** **REGISTRATION, BREAKFAST & NETWORKING**
- 9:00 – 9:15 AM** **INTRODUCTION & WELCOME - STEPHEN CONROY & PAULA CORDEIRO**
- 9:15 – 9:20 AM** **SPONSOR SPEECH - BANK OF THE WEST, DEANNA KENDALL**
- 9:20 – 10:15 AM** **KEYNOTE SPEAKER - LARRY REED, MICROCREDIT SUMMIT CAMPAIGN**
- 10:15 – 10:30 AM** **COFFEE BREAK**
- 10:30 – 11:30 AM** **PLENARY SESSION**
- JONNY PRICE, KIVA
 - JEAN CLAUDE RODRIGUEZ, PUDDLE
 - PAUL NIEHAUS, GIVEDIRECTLY
 - MODERATOR, CRAIG McINTOSH, UCSD
- 11:30 – 11:45 AM** **MICROFINANCE CLIENT SUCCESS STORY- ANGELA MAWEU**
- 11:45 – 1:00 PM** **LUNCH AND MARKETPLACE**
- 1:00 – 2:00 PM** **BREAKOUT SESSIONS (CONCURRENT)**
- THE CHANGING HORIZON OF LOCAL MICRO LENDING: IMPACT, INNOVATION AND ADVOCACY
 - EMERGING MODELS: RETURNING TO TRADITIONAL WAYS OF SAVING AND SHARING
- 2:10 – 3:15 PM** **PLENARY SESSION: EDUCATION & MICROFINANCE**
- LARRY REED, MICROCREDIT SUMMIT CAMPAIGN
 - CHRIS CRANE, EDIFY
 - MODERATOR: PAULA CORDEIRO, USD
- 3:15 – 4:30 PM** **NETWORKING RECEPTION**



Keynote Speaker

Larry Reed, Microcredit Summit Campaign

Larry Reed is the director of the Microcredit Summit Campaign. He has worked for more than 25 years in designing, supporting and leading activities and organizations that empower poor people to transform their lives and their communities. For most of that time Larry worked with Opportunity International, including five years as their Africa regional director and eight years as the first CEO of the Opportunity International Network. During his time with Opportunity International, Larry helped to implement a strategy for developing full-service banks that served the very poor while mobilizing hundreds of millions of dollars in savings deposits and investments. Under his leadership, Opportunity developed the first micro-insurance brokerage, which now serves hundreds of millions of people around the world.

Larry has taught at the Boulder Institute of Microfinance for 15 years, served as the chair of the SEEP Network, and consulted with industry-wide initiatives like the Smart Campaign for Client Protection and MicroFinance Transparency. Larry authored the *State of the Microcredit Summit Campaign Report* in 2011, 2012, and 2013 and has contributed to several books on finance and the poor including *The New World of Microfinance* (Rhyne, Otero, et. al., 1996), *Serving with the Poor in Africa* (Yamamori, Myers, Bediako and Reed, 1996), *Globalization and the Kingdom of God* (Goudzwaard, 2001), and *More Pathways Out of Poverty* (Harris et. al., 2006). He is a graduate of Wheaton College and the John F. Kennedy School of Government at Harvard University.

Moderators

Paula Cordeiro, University of San Diego (USD)

Paula Cordeiro grew up in New England and is a former teacher, principal and school head in international, bilingual schools in Venezuela and Spain. She holds a Master's degree in TESOL from Rhode Island College and a doctorate in Educational Leadership from the University of Houston. Paula is currently a professor and dean of the School of Leadership and Education Sciences (SOLES) at the University of San Diego. In 2007 Paula was appointed to the board of The James Irvine Foundation in San Francisco and also serves on the boards of San Diego Grantmakers, the international micro-lender Edify, and the Boston-based nonprofit Community Technical Assistance Center (CTAC). She is the author of three books and in 2012 completed, with co-author Bill Cunningham, the 5th edition of her textbook *Educational Leadership: A Bridge to Improved Practice*.

Craig McIntosh, University of California, San Diego (UCSD)

Craig McIntosh is a Professor of Economics at the School of International Relations and Pacific Studies, UC San Diego. He received his Ph.D. from the University of California, Berkeley in agriculture and resource economics. He is a development economist whose work focuses on program evaluation. His main research interest is the design of institutions, which promote the provision of financial services to micro-entrepreneurs. He has conducted field evaluations of innovative anti-poverty policies in Mexico, Guatemala, Malawi, Rwanda, Uganda, and Tanzania. He is currently working on research projects investigating how to boost savings among the poor, on whether schooling can be used as a tool to fight HIV/AIDS in Sub-Saharan Africa, and on mechanisms to improve the long-term viability of Fair Trade markets.

Panelists- Morning Plenary Session

Jonny Price, Kiva

Jonny Price first came to Kiva in 2009 as a volunteer on a 5-month externship from his management consulting firm Oliver Wyman. After 6 years at Oliver Wyman, first in London and then in San Francisco, he joined Kiva full-time in September 2011 as Senior Director to lead the Kiva Zip program. Jonny is married to Ali, who he met at Kiva, and occasionally you may glimpse them cycling their tandem to work. He graduated with a BA in History from the University of Cambridge.

Paul Niehaus, GiveDirectly

Paul Niehaus is an Assistant Professor in the Department of Economics at UC San Diego as well as a Faculty Research Fellow at the National Bureau of Economic Research, a Junior Affiliate at the Bureau for Research and Economic Analysis of Development (BREAD), an Affiliate of the Jameel Poverty Action Lab (J-PAL), and an Affiliate at the Center for Effective Global Action (CEGA). His research deals with program implementation in developing countries and with learning. He is also co-founder and president of the nonprofit GiveDirectly. In 2013 Foreign Policy named him one of its leading 100 "Global Thinkers."

Jean Claude Rodriguez , Puddle

Jean Claude Rodriguez is a co-founder of Puddle with Matt Flannery, CEO of Kiva. Puddle is an online platform that gives individuals instant access to a line of credit and a platform where money is lent and borrowed freely among members. Before moving to San Francisco, he implemented Puddle offline in more than 10 countries. He is an Ashoka fellow and was selected Best Creative Entrepreneur of the World in 2008. He holds a Ph.D. in Microfinance.

Panelists- Afternoon Plenary Session

Chris Crane, Edify

Chris Crane is President & CEO of Edify, a humanitarian organization he founded in September 2009 to make loans to Christian schools educating disadvantaged children in Africa and Latin America. Chris Crane served from 2002-2009 as President & CEO of Opportunity International, the world's largest faith-based microfinance organization. During Chris' tenure, Opportunity's revenues grew at a compounded annual rate of 30%. He earned an MBA from Harvard Business School, a Bachelor of Science, summa cum laude, in Finance from Boston College. He studied economics, art appreciation and music appreciation for two years at the University of Vienna, Austria. In 1999 he was awarded the Ernst & Young/USA Today Entrepreneur of the Year Award and he was a member of the Young Presidents' Organization (YPO) from 1990 to 2002. He has been married to Jane for 30 years, and they have one son, Andy.

Larry Reed (see bio above)

Afternoon Breakout Sessions

1:00 p.m. to 2:00 p.m. (concurrent)

The Changing Horizon of Local Micro Lending: Impact, Innovation and Advocacy (Conference Room C)

Practitioners in the evolving field of micro lending are continually challenged to develop innovative solutions to address the need for access to capital and business education. The nature of these solutions can vary but the goal is always the same: creating lasting impact for underserved entrepreneurs. In this session, microfinance practitioners will discuss how their micro lending programs have evolved to meet the needs of the local market in four tangible ways including: policy advocacy for systemic changes to benefit small businesses, expansion of traditional underwriting processes to include character and commitment to business training, impact analysis via measurements of household and business income, and collaborative approaches to delivering business assistance to entrepreneurs.

Panelists

Valery Belloso, ACCION San Diego, Business Development Officer

Kaitlan Hammock, Microenterprise Program Manager, International Rescue Committee

Susan Lamping, Vice President of Community Lending, CDC Small Business Finance

Sandra Martinez, Program Manager, Foundation for Women

Emerging Models: Returning to Traditional Ways of Saving and Sharing (Conference Room D)

In recent years new models designed around savings are appearing in the world of micro-finance. In a way this is a return to traditional models used by villages. Many communities are hesitant to enter into debt outside of their community relationships or do not have a third party linking them to sources of capital. Some communities, due to cultural traditions, do not believe in debt as a development vehicle. In this panel discussion we will explore the history of this movement and hear from organizations exploring these new methodologies.

Panelists

Jean Fort, Founding Director, Women's Empowerment

Anna Lu, Founder, EPTEAM Network at UCSD and San Diego Microfinance Puddle

Neils Lund, Executive Director, Microloans for Mothers

Jean Claude Rodriguez, Co-Founder, Puddle

Panel Moderator: Elisa Sabatini, Executive Director, Via International