

The Bottom Line of Disabilities

*A symposium on innovative ways
to address social, financial, and
economic issues related to disabilities*



*Investing
in Social
Change*

Sarah, the Face of a New Generation.

TUESDAY, JANUARY 20, 2015

3495 SOUTH WEST TEMPLE, SALT LAKE CITY, UT

E V E N T P A R T N E R S



COLUMBUS

Entrepreneurs of the Human Spirit™

Columbus Community Center (www.columbuserves.org) is recognized locally and nationally as a well-established, innovative nonprofit agency. Columbus works strategically with many stakeholders to support individuals with disabilities so they can make informed decisions and live with independence in the community. After nearly five decades of serving thousands of individuals, Columbus is still finding innovative ways to provide individuals with disabilities the support to live with independence and dignity in our community.



**Global
Interdependence
Center**

The Global Interdependence Center (www.interdependence.org) is a neutral convener of dialogue, organizing conferences and roundtable discussions around the country and around the world to identify and address important global issues. Its programming promotes global partnerships among government officials, financial institutions, businesses leaders, and academic researchers.

E V E N T S P O N S O R S



GE Capital Bank

**Goldman
Sachs**

A G E N D A

EVENT EMCEES

Michael Drury, McVean Trading & Investments

Stephanie Mackay, Columbus



7:30 A.M. TO 8 A.M.

Registration & Continental Breakfast

8:00 A.M. TO 8:30 A.M.

KEYNOTE SPEAKER

Salt Lake County Mayor

Ben McAdams



“A Call to Action: Using ‘Pay for Success’ Impact Investing to Address Large-Scale Social Change,” A discussion of how Salt Lake County is challenging the community to leverage private, government, and non-profit resources to transform the delivery of social services while demonstrating system-wide change.

8:30 A.M. TO 9:30 A.M.

The Policies that Shape Opportunity, Controversy, and Change

Public policy and traditional funding sources have created safety nets, provided opportunity for community integration, and given a voice to some of the most vulnerable in our communities. There have been significant social changes as well as some unintended consequences.

MODERATOR:

Palmer DePaulis, Former Mayor of Salt Lake City



- “A Washington Insider’s Look at the Americans with Disabilities Act,”

James Lucier, Principal, Capital Alpha



- “Disability Benefit Reform: What We Can Learn from OECD Nations,”

Philippa Dunne, Co-editor, *The Liscio Report*



- “The Role Utah Non-profits Play in Stewarding Government and Donor Funds to Deliver Disability Services,” **Ann Williamson**, Executive Director, State of Utah Health and Human Services
- “Healthcare for Individuals with Disabilities: What Works and Where

A G E N D A

We Can Innovate,” **Dr.**

William McMahon,

Chair, U of U Department
of Psychiatry



- “What will the Future Look Like for Sarah?,”

Mike Willhard, Vice President and CIO,
Workers Compensation Fund



Lee Sorenson Center for Global Impact Investing

- “Local Governments and Nonprofits Working with Wall Street to Tackle Social Issues through Capital Allocation,” **Mike McKee,** Bloomberg



- “A CIO’s Thoughts on Impact Investing: the Risks and Rewards for Investors,” **Steve Sexauer,** Allianz



9:45 A.M. TO 10:45 A.M.

Harnessing Entrepreneurs and Capital Markets to Drive Social Change through Impact Investing

Social impact investing is not a new notion, but new practices and ideas continue to emerge and change how we implement meaningful solutions to challenging social issues.

MODERATOR:

Peter Gold,

TheGoldGroup, LLC



- “The Community Reinvestment Act (CRA) in Targeting Community Need,” **Jan Bergeson,** CRA Director, Ally Bank



- “The New Venture Capital: Social Impact Investing,” **Lewis Hower,** Executive Director, James



11 A.M. TO NOON

Public/Private Partnerships Tackling Autism

Young adults with autism are leaving public school in record numbers.

Educators, families, nonprofit agencies, corporations, and social entrepreneurs are finding ways to work collectively to support young adults as they transition from school to the community.

MODERATOR:

Michael Drury, Chief

Economist, McVean

Trading & Investments



- “Tapping into Tech Talent: How Creativity Unlocks Potential Among Youth with Autism,” **Dr. Cheryl Wright,** University of Utah NeuroVesity



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- “The Power of Different – Employing People with Autism,” **Thorkil Sonne**, Founder, Specialisterne
- “Autism at Work: SAP’s International Commitment,” **José Velasco**, Head, SAP U.S. Autism at Work Program
- “The LaunchPad Program for Young Adults with Autism: A Collective Impact Initiative,”
Gary Knapp, Executive Director, Columbus



- “So Many Questions, So Few Answers: One Family’s Story of Living with Autism,” **Laura Anderson**, President, Autism Council of Utah



NOON TO 1:00 P.M.

Closing Remarks

Michael Drury

Lunch and Tour of Columbus

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Laura Anderson, President, Autism Council of Utah. Laura is a licensed health facility administrator and has worked as an SNF administrator and consultant for the past 25 years. She has an undergraduate degree in psychology and certificate in gerontology from Utah State University and a master's degree from the University of San Francisco in rehabilitation administration. She left working as an administrator to become an advocate for her son Ty, who was diagnosed with autism. She is currently on the leadership team of the Autism Council of Utah and serves on various boards and committees advocating for autism services, education, and awareness.

Jan Bergeson, CRA Director, Ally Bank. Jan manages the \$1.4 billion community development portfolio at Ally Bank, a \$100 billion bank located in Salt Lake City, Utah. Prior to joining Ally Bank she served as executive director and CRA officer for UBS Bank USA. She also worked for the law firm Callister Nebeker & McCullough where she was an associate and partner. She attended Brigham Young University where she received her J.D. from the J. Reuben Clark Law School and her B.A. in English Language and Literature/Letters. She has served on the board of directors for Utah Bankers Associa-

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tion, Junior Achievement, the Utah Community Reinvestment Corporation, and the Utah Shakespeare Festival.

Palmer DePaulis, Former Mayor of Salt Lake City. Palmer was appointed as mayor of Salt Lake City for seven months after Ted Wilson resigned in 1985 and was subsequently elected to that position in November of 1985. In 1993 he became director of public relations and then chief of staff to Attorney General Jan Graham and served in that office for six years. From 1999 through June of 2006, Mr. DePaulis served as a commissioner at the Utah State Tax Commission. In June of 2006, he was appointed by Governor Huntsman as executive director of the Department of Community and Culture. In June of 2010, Governor Herbert appointed him as executive director of the Department of Health and Human Services, where he served until his retirement in 2013.

Michael Drury, Chief Economist, McVean Trading & Investments. Michael is the chief economist for McVean Trading & Investments, LLC. He joined the firm in 1992, after serving for five years as senior economist with Allen Sinai at Shearson Lehman Brothers and its successor firms. Michael began his career in New York in 1982 as senior economist at A. Gary Shilling and Company. He received his B.S. in economics from the Georgia Institute of Technology and did his graduate work at the University of Wisconsin-Madison. Michael assesses macroeconomic developments around the world to help develop hedging strategies using futures markets in interest rates, currencies, and industrial materials.

Philippa Dunne, Co-Editor, *The Liscio Report* and *Sightlines Bulletin*. Philippa is co-editor of two independent macro-economic newsletters: *The Liscio Report*, with a trading focus, and *Sightlines Bulletin*, which takes a longer perspective. She has a long history in independent research, has completed research and writing for the American Museum of Natural History and the office of Ray and Charles Eames, and has taught at the college level. A graduate of the University of California, she has a graduate degree from Wesleyan University.

Peter A. Gold, Principal, TheGoldGroup LLC. Peter is the founder and president of TheGoldGroup, LLC. Prior to founding TheGoldGroup, Gold earned his bachelor's degree at Cornell University and then went on to graduate magna cum laude from Temple University Law School. Eight years later, he became a partner and then member of the

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Board of Directors of one of America's top 100 law and government relations firms. At the end of 2005, Gold became associate provost of economic initiatives, senior associate dean of the School of Business and CEO of the business incubator operations at Rutgers University-Camden. In 2007, he launched TheGoldGroup, a consultancy that has brought businesses, universities, governments and not-for-profits together in order to create value, seize new opportunities, meet new challenges and reduce exposure to the risks created by today's global economy.

Lewis Hower, Executive Director, James Lee Sorenson Center for Global Impact Investing. Lewis is the executive director of the James Lee Sorenson Center for Global Impact Investing (SGII). Prior to the creation of SGII, he served as the marketing manager for the Sorenson Housing Opportunity Fund. Previously, Mr. Hower managed finance and operations for Unitus Investment Group where he worked in the development of innovative for-profit approaches to solving some of the world's most profound social challenges. Mr. Hower currently serves on the Board of Directors at the Community Foundation of Utah where he is the co-director of the committee for entrepreneurship and is focused on innovating new models of social and business development for community engagement. Lewis holds a B.S.E. in bioengineering from Arizona State University where he spent time working in startup biotechnology research and small business operations.

Gary Knapp, Executive Director, Columbus Community Center. Gary has a 30-year history working in disability services. For the past 10 years he has served in senior leadership positions of two large and well-respected nonprofit agencies in Utah. He joined Columbus Community Center in 2010 as the director of business operations, and in 2012 he was named executive director. From 2002 to 2010, he was executive director of Enable Industries in Ogden. Under his leadership, he has ensured that Enable Industries and Columbus have maintained CARF accreditation. CARF is considered to have the highest level of international standards for agencies that provide residential and vocational services for individuals with disabilities.

James Lucier, Managing Director, Capital Alpha. James is a managing director at Capital Alpha, where he leads the energy, environmental, and tax practices. He provides predictive, insightful analysis of trends in Washington energy and climate policy for an array of clients including asset managers, private equity investors, commodity traders,

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and investment bankers. His fields of expertise are domestic U.S. energy production, alternative energy, energy infrastructure and electric power, especially as they are impacted by regulation, litigation, and the U.S. political cycle. Before co-founding Capital Alpha Partners in 2007, Lucier was a senior vice president at Prudential Equity Group, where for nine years he was a member of Prudential's well-known Washington strategy group (repeatedly ranked #1 by *Institutional Investor Magazine*) and of equity research teams covering oil and gas, power and utilities, and industrials.

Stephanie Mackay, Columbus Community Center, Director of Development.

Stephanie oversees the development and marketing efforts at Columbus. Since joining the organization in 2004, she has overseen two capital campaigns that contributed to Columbus's major capital expansions in 2006 and 2012. She has helped guide the efforts to establish and grow the Dignity through Work Scholarship Fund, geared specifically for young adults with developmental disabilities who have few options for post-secondary vocational training. She has worked in higher education, corporations, and nonprofit organizations at local, national and international levels. She has experience soliciting funding from private donors, corporations, foundations and local, state and Federal entities. She currently serves as board president for Women's World Health Initiative.

Ben McAdams, Mayor, Salt Lake County. Mayor McAdams was sworn into office as Salt Lake County mayor on Jan. 7, 2013. During his tenure as County mayor, he has championed education, helping the county become the first in the country to partner with the private sector to offer greater access to high-quality preschool for low-income children. Mayor McAdams has also emphasized economic development and job growth, partnering with cities to attract business while being a careful steward of taxpayer dollars. He has also supported greater access for businesses and residents to transit, trails and open space. Mayor McAdams is a graduate of the University of Utah and Columbia Law School. After Columbia Law School, he worked as a corporate finance attorney with firms in New York and Salt Lake City.

Mike McKee, Economics Editor, Bloomberg. Michael is co-host of "Bloomberg on the Economy" on Bloomberg Radio and economics editor for Bloomberg Television and Bloomberg News. As the economics editor for Bloomberg Television, he provides "The McKee Note," keeping viewers up to date on market and political developments, eco-

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nomic trends and central banks in the U.S. and around the world. Since joining Bloomberg in 1995, McKee has held numerous positions, including roles as White House correspondent, economics and Federal Reserve reporter, congressional correspondent and Treasury Department correspondent. Prior to joining Bloomberg, McKee covered politics for a variety of news organizations including *Newsweek*. He spent 10 years at the White House reporting on Presidents Reagan, H.W. Bush and Clinton. McKee holds an undergraduate degree from Colorado State University and has done graduate work in economics at Johns Hopkins University.

Dr. William McMahon, Chairman, University of Utah Psychiatry Department.

Since 2007, Dr. McMahon has worked to build excellent clinical services and systems of care at the University of Utah. He is board certified in adult psychiatry and in the subspecialty of child and adolescent psychiatry. He has cared for children, adolescents and adults in inpatient, outpatient and other settings for more than three decades. He has followed his particular interest in developmental disorders, including autism, Tourette's Disorder and other psychiatric conditions with increased genetic risk, such as suicide and nicotine addiction. Currently, his responsibilities are focused on fostering innovative approaches to diagnosis, treatment and recovery.

Stephen Sexauer, Chief Investment Officer, US Multi Asset, Allianz Global Investors.

Stephen Sexauer has been the chief investment officer, US Multi Asset, Allianz Global Investors since inception in June 2008, and has been a managing director of Allianz Global Investors of America LLC or one of its subsidiaries since May 2003. Mr. Sexauer has overall responsibility for all investment functions at AGI Solutions and is directly responsible for portfolio risk profiles, asset allocation and fund selection. Mr. Sexauer is also a member of the AGI Fund Management Board. Prior to Allianz, Mr. Sexauer was a portfolio manager at Morgan Stanley Investment Management from July 1989–March 2002. Mr. Sexauer worked at Salomon Brothers from November 1986–June 1989. Mr. Sexauer previously worked in economic consulting at Merrill Lynch Economics and at Wharton Econometrics. Mr. Sexauer holds an M.B.A. from the University of Chicago with concentrations in economics and statistics and a B.S. from the University of Illinois in economics.

Thorkil Sonne, Founder, Specialisterne and the Specialist People Foundation.

Thorkil is internationally recognized for his work founding Specialisterne (Danish for

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“The Specialists”) and the Specialist People Foundation. In partnership, these two organizations are working towards the goal of creating job opportunities through social entrepreneurship, corporate partnerships and innovative employment models for individuals with Autism Spectrum Disorder (ASD). A number of countries have already adopted his innovative model. Mr. Sonne has a long background in the private IT business, was president of a local branch of Autism Denmark and is father of three sons – one of whom has autism. He has been recognized as an Ashoka Globalizer Fellow and Schwab Foundation Social Entrepreneur. He has been featured in *The New York Times*, *The Wall Street Journal* and *Harvard Business Review*.

José H. Velasco, Head, Autism at Work, SAP. Jose is vice president of product management and head of the Autism at Work initiative in the United States at SAP. Mr. Velasco's 28-year IT/Software career spans public and private sectors in companies ranging from startups to Fortune 50 enterprises. During his tenure of more than 17 years at SAP, Mr. Velasco has occupied roles in product management, consulting, development, strategy, go-to-market and HR/diversity functions. Mr. Velasco holds a master's degree in technology commercialization from the University of Texas at Austin and a B.S. in computer science from Tecnologico de Monterrey in Monterrey, Mexico.

Mike Willhard, Vice President and CIO, Workers Compensation Fund. Mike is the vice president and chief investment officer (CIO) for the Workers Compensation Fund (WCF), where he has worked since 1996. In his current position, he is responsible for WCF's \$1.7 billion investment portfolio. Prior to his role as CIO, he served as finance vice president, assistant portfolio manager, financial operations manager, and internal auditor. Before joining WCF, he worked as a senior accountant with Ernst & Young and manager of financial reporting for AMEX Life Assurance Company. He and his wife Tammy have two children, Sarah, who works for Intermountain Healthcare Central Laundry, and Brian, who is a senior, studying mechanical engineering at the University of Utah.

Ann Silverberg Williamson, Executive Director, Utah Department of Human Services. Ann was appointed executive director of Utah Department of Human Services in October 2013. Prior to this position she was the president and CEO of Louisiana Association of Nonprofit Organizations (2009–2013) and led the Louisiana Department of Social Services (DSS, now Department of Children and Family Services) from 2001–2008. During her tenure, DSS was awarded the U.S. Department of Agriculture

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Pinnacle Award, a national citation of excellence, for efforts following Hurricane Katrina. A native of Louisiana, she served that state for 15 years working in both the public and private sectors in the interests of human services. Throughout her career, she has been viewed as a reformer seeking the most effective and efficient use of resources, through partnerships, to produce results for those she serves. In 2012, she was honored as one of the nation's top 50 leaders by *The NonProfit Times*. Ann graduated from Wofford College, in Spartanburg, South Carolina, with a degree in theology and earned a master's in social work from Louisiana State University (LSU).

Cheryl Wright, Associate Professor and Founder, NeuroVersity at the University of Utah. Cheryl Wright is an associate professor in the University of Utah's Family and Consumer Studies. She received her Ph.D. in human development and family studies and early childhood education from Oregon State University. Her primary research focuses on creativity and the social emotional development in young children. She has been honored with the University of Utah's Distinguished Teaching and Distinguished Service awards. Most recently, Dr. Wright has focused on research on school-aged young adults with autism. She and Dr. Scott Wright have launched the NeuroVersity program at the University of Utah, which is a collaborative effort to conduct research, develop curriculum and offer vocational training to young adults with autism using the 3D modeling software SketchUp. She and her colleagues have presented their program at national conferences and have developed a teacher-training toolkit so that educators may start a program in their own classrooms.

“BORN ELECTRICAL— GROWING UP AUTISTIC”

ROSLIE WINARD is an acclaimed photographer whose interests range from avian primitives to landscapes to portraits of individuals with autism. Early in her professional life, she worked as a caregiver in the northeast, where she started photographing intimate portraits of individuals with autism, their families, and their caregivers.

Select pieces from her collection

“Born Electrical—Growing Up Autistic” are on display during the **2015 Bottom Line of Disabilities Symposium**. This collection has been shown around the country, and her photographs portraying individuals with autism have been featured on *60 Minutes*, PBS, BBC, Bravo, and HBO. In the course of her work, she became acquainted with Dr. Temple Grandin, professor of Animal Science at Colorado State University and renowned for her groundbreaking work designing livestock handling facilities. As their friendship evolved, Rosalie documented Temple's early successes in the livestock industry as well as her growing reputation as an advocate for individuals with autism. Rosalie

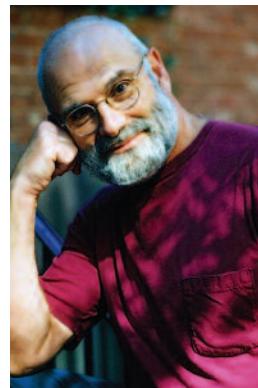
received her bachelor's degree in Natural History, with a specialization in Ornithology and Ethology from New College in Sarasota, Florida. It was there that she conducted a field study on Brown Pelican's threat and greeting displays, which led to her interest in documentary film, video art, and finally photography. Winard's award-winning photographs have appeared in numerous publications including *Artforum*, *The New York Times*, *Forbes*, and *Le Monde*. Her pictures are in the permanent collections of The Brooklyn Museum of Art and the Library of Congress, and in the private collections of Nelson Mandela, Oliver Sacks, and many others. (www.rosaliewinard.com)



TEMPLE GRANDIN



JESSICA PARK



OLIVER SACKS