

## Bios of Speakers for OS-Climate April 17<sup>th</sup> 2020 Webinar



**Hewson Baltzell** is President, COO and initial investor in Helios Exchange, a SaaS business focused on energy efficiency in commercial buildings that has significant potential for reducing carbon emissions. Helios is the world's first commercial real estate platform for energy retrofit project development, insurance, and financing, with analysis of over 300,000 commercial properties nationwide.

Having co-founded what is now MSCI ESG Research, Hewson spent 17 years building the dominant firm in the environmental, social and governance research field, from a 2-person start-up in 1998 (Innovest). He and his team conceived and built the rating models, carbon estimation models and many of MSCI's current products. The ESG unit now has 300 employees, over 1,000 clients, research on over 9,000 equities, 250,000 bonds, and 35,000 mutual funds and ETFs, covering over 1.6 million securities, and revenue of \$100 million.

Hewson was on the Board and Audit Committee of the Global Impact Investing Network for 7 years through December 2018 and has been on the Standards Advisory Council (the rating committee) of B-Lab for over 9 years.

Hewson recently spent a year as CEO of the Sorenson Impact Center at the University of Utah's David Eccles School of Business. Founded and endowed by Jim Sorenson, an entrepreneur and early impact investor, the Center has 30 full time staff and 60 interns and focuses on managing an early stage impact investing fund, on helping to solve social issues through data analytics and innovative financing structures, and on education through intern programs, impact-related courses, executive education, and the annual Winter Innovation Summit.

Prior to Innovest, Hewson spent 12 years in real estate finance at JPMorgan, Lehman Brothers, and private investment companies. He has an MBA in Finance from Wharton and a BA in International Relations from the University of Pennsylvania.



**Lisa Eichler, Co-head Climate & ESG Solutions at Ortec Finance.**

Lisa dedicates her efforts to mainstreaming climate change across the investment decision process by integrating sustainability data and methodologies into mainstream financial technology and solutions. Lisa has focused her studies and career on facilitating the interactions between environmental science and policy providing analysis and advice on topics relevant for the transition towards a low-carbon, climate-resilient economy.

Lisa has sound expertise on the topics of climate change (adaptation and mitigation), disaster risk/resilience and biodiversity/nature-based solutions. Prior to joining Ortec Finance, Lisa has worked as a consultant for various companies implementing projects for European institutions, national governments and international organizations, on environment and sustainability issues involving a combination of complex scientific research, economic/financial assessment tools, as well as delivering a clear message to policy/decision-makers. Lisa earned her Master of Science in Environmental Management and Master of Arts in Global Public Policy at Duke University, USA.



**Ekaterina (Katya) Gratcheva, Lead Financial Officer, Finance, Competitiveness and Innovation (FCI) Global Practice, World Bank.** Dr. Ekaterina (Katya) Gratcheva is the Lead Financial officer in the World Bank's Finance, Competitiveness and Innovation Global Practice (FCI GP) focusing on providing policy advice on sustainable finance, facilitating long term finance through capital markets and strengthening the role of institutional institutions in development finance.

In her 20-year career in the financial industry, Ms. Gratcheva has led policy dialogue with ministries of finance, central banks, public pension funds and international financial institutions on issues related to sovereign assets, liabilities and risks and developing access to capital markets. Ms. Gratcheva's earlier roles included investment management of the World Bank Group's own assets, risk and performance management, and banking.

She holds a Master of Public Administration from Harvard Kennedy School, Doctor of Science in Operations Research from George Washington University and Master of Science in Applied Science from Moscow State University.



**Josh Green** co-founded Panjiva, which was acquired in 2018 by S&P Global Market Intelligence (NYSE: SPGI). Panjiva provides essential supply chain intelligence — insight into the supply chain activity of millions of companies around the world — to 18,000 decision-makers. Josh attended Dartmouth College before starting his career at The Boston Consulting Group. Josh subsequently returned to school, earning master’s degrees from Harvard’s JFK School of Government and Harvard Business School.

In 2006, Josh co-founded Panjiva after learning first-hand about the challenges of doing business across borders without solid data about potential counterparties. As CEO of Panjiva for over a decade, Josh led the company from its founding to a spot on the Inc. 500 and ultimately through its sale to a Fortune 500 acquirer. Panjiva’s data and Josh’s insights have frequently been featured in The New York Times, The Financial Times, and The Wall Street Journal. Together with Panjiva co-founder James Psota, Josh holds several patents covering the transformation of unstructured data into useful insights. Today, Josh serves on the senior leadership team of S&P Global Market Intelligence, the data and analytics division of S&P Global. Josh is passionate about expanding opportunities for all and serves on the board of a non-profit focused on childhood literacy, Reach Out and Read of Greater New York.



**Robert Litterman** is the Chairman of the Risk Committee at Kepos Capital LP. Prior to joining Kepos Capital in 2010, Litterman enjoyed a 23-year career at Goldman, Sachs & Co., where he served in research, risk management, investments, and thought leadership roles. While at Goldman, Litterman also spent six years as one of three external advisors to Singapore's Government Investment Corporation (GIC). Bob was named a partner of Goldman Sachs in 1994 and became head of the firm-wide risk function; prior to that role, he was co-head of the Fixed Income Research and Model Development Group with Fischer Black. During his tenure at Goldman, Bob researched and published a number of groundbreaking papers in

asset allocation and risk management. He is the co-developer of the Black-Litterman Global Asset Allocation Model, a key tool in investment management, and has co-authored books including *The Practice of Risk Management* and *Modern Investment Management: An Equilibrium Approach* (Wiley & Co.).

Litterman earned a Ph.D. in economics from the University of Minnesota and a B.S. in human biology from Stanford University. He is also the inaugural recipient of the S. Donald Sussman Fellowship at MIT's Sloan School of Management and serves on a number of boards, including Commonfund, the Robert Wood Johnson Foundation, the Sloan Foundation, and World Wildlife Fund. He is also currently serving as the chair of the CFTC Climate-Related Market Risk Subcommittee.



**Dr. Ana Pinheiro Privette** is a senior program manager with Amazon's Sustainability group. She joined the Sustainability Science and Innovation team in September 2017 as the program lead for the Amazon Sustainability Data Initiative (ASDI), a program that seeks to leverage Amazon's scale, technology, and infrastructure to help create more global innovation for sustainability. ASDI is a Tech-for-Good project focused on democratizing access to key data and analytical capabilities to anyone working in the sustainability space.

Ana was trained as an environmental engineer and as an earth sciences researcher at the New University of Lisbon (Portugal) and at MIT. She did her doctoral research work at NASA Goddard Space Flight Center and as part of her project, she spent a couple of years running scientific field work sites in Africa to support a NASA international field campaign. While working at NOAA, Ana worked on the US National Climate Assessment (NCA) project focusing on bringing more transparency and traceability of the data sources supporting this climate report. After spending most of her career at NASA and NOAA as a scientist, Privette led projects for the White House climate portfolio, including the Obama Climate Data Initiative (CDI) and the Partnership for Resilience and Preparedness (PREP), both focused on delivering better access and use of US Federal climate data to support researchers and decision makers.



**Dr. Julie Pullen** is Director of Product at Jupiter Intelligence, a start-up delivering hyper-local predictions of weather, water and climate impacts using cloud computing. She is an adjunct research scientist at Columbia's Lamont-Doherty Earth Observatory and advises the Environmental & Climate Sciences Department of Brookhaven National Laboratory. Previously Dr. Pullen was Associate Professor in Civil, Environmental, and Ocean Engineering at Stevens Institute of Technology where she led international multidisciplinary teams in integrated oceanography, meteorology and urban field and modeling studies.

Dr. Pullen's expertise spans climate, weather and hydroscience with a particular focus on high resolution coastal urban prediction for flooding, heatwaves and other perils. She has served on National Academy of Science panels for climate (reviewing the most recent National Climate Assessment) and earth system prediction. Dr. Pullen previously led the Department of Homeland Security's National Center for Maritime Security and is currently on the Sustainability and Climate Risk Advisory Committee for the Global Association of Risk Professionals.

Dr. Pullen holds a master's degree in applied mathematics from the University of Arizona, and a Ph.D. in physical oceanography from Oregon State University. She was the first undergraduate intern at the Santa Fe Institute and later worked at Los Alamos National Laboratory's Center for Nonlinear Studies. She is a Fulbright Scholar (Philippines), a Fellow of the Explorers Club, and was a science fellow at Stanford's Center for International Security and Cooperation.



**Gary Rahl** is a Deloitte Managing Director and member of the leadership team for Deloitte's Government and Public Services energy practice. He directs and manages teams serving energy sector clients on engagements including regulatory and policy transformation, utility business models, energy technology innovation, and the enablement of markets for energy services. Prior to joining Deloitte, Gary was an Executive Vice President at Booz Allen and leader of that firm's energy practice for a decade. During his career of nearly 25 years, he has worked with commercial clients across the supply chain for electric power and natural gas, and public sector clients at the federal, state, and local levels.

Gary's career highlights include recent high-impact engagements to identify the potential role of data and data access in transforming the energy distribution system (electric and natural gas grids) into a platform for clean energy solutions and innovation. He also served as Officer-in-Charge comprehensive support to DOE's Advanced Research Project Agency – Energy (ARPA-E), identifying and funding high-potential next-generation energy technologies in renewable energy, materials, energy storage, transmission optimization, power control systems, and end use efficiency, and supporting transition of successful performers to market success.

Gary has a Master of Public Policy from the John F. Kennedy School of Government at Harvard University and two Bachelor of Science degrees from the Massachusetts Institute of Technology.



**Rene Ramos** is in a newly created role of Climate Risk Executive, Global Environmental and Social Risk Management at JPMorgan Chase. In this role, he is charged with developing the risk framework for the firm's approach to managing climate-related risk, including the processes of risk identification, evaluation, scenario design, analysis, and conciliation with risk appetite.

Rene began his career at J.P. Morgan Chase in 2007 in New York working in Country Risk Management, transferring to London in 2011. Rene conducted fundamental macro and political analysis on sovereigns and helped manage firmwide exposures across all asset classes and businesses. As head for

EM EMEA coverage, Rene was involved in discussing risk mitigation strategies with business and country leads in the region.

Rene holds a MPA degree at Columbia University in New York City, focusing on International Finance and Policy, and a B.A. (honors) in Economics at the ITESM in Monterrey, Mexico, while specializing in quantitative methods at the University of Lausanne, Switzerland. He also earned the institution's distinction for student leadership.



**Truman Semans** is Founder and Chief Executive of OS-Climate, a breakthrough Open Source solution for climate-smart investing. Using the proven Linux Foundation approach for community-driven projects to solve complex challenges, the OS-Climate Foundation is developing a non-profit data and modeling platform that enables investment decisionmakers to run scenario-based predictive analysis for accurately forecasting and pricing risk and opportunity related to physical climate impacts and economic transition. Responding to the universal call for more rigorous, transparent, and affordable corporate climate data, OS-C's Data Commons will provide company metrics as a public good.

Previously, Truman was CEO of Element Capital Advisors, helping family offices and foundations integrate ESG into their portfolios. He was a Partner of strategy consultancy GreenOrder, helping clients including private equity firms, Morgan Stanley, Google, GM, GE, Duke Energy, SABIC, and DuPont drive growth and profitability through investments in environmental innovation, resource efficiency, and clean technology. Truman led the Pew Business Environmental Leadership Council and co-founded the U.S. Climate Action Partnership (USCAP) and the U.S. Partnership for Renewable Energy Finance (USPREF). He consulted with McKinsey & Co., served as the U.S. Treasury Department International Economist for global environment, and was the finance lead on the U.S. Climate Change Negotiating Team.

He has an MBA and BA from Duke University and a Masters in International Economics from Johns Hopkins SAIS. He serves on the boards of the [National Wildlife Federation](#), the Duke University School of the Environment. and the [American Farmland Trust](#) and on the Advisory Board of Coast Capital, LLC.



**Michael Tiemann** is an open source software pioneer. He began contributing to the GNU C compiler project in June of 1987 and shortly thereafter began writing the first native-code C++ compiler and debugger more than three decades ago. His early work led to the creation of leading open source technologies and the first open source business model.

In 1989 he co-founded Cygnus Solutions, the first company to provide commercial support for open source software. During his 10 years at Cygnus, Tiemann contributed in a number of roles, from president to hacker, helping lead the company from fledgling start-up to an open source leader. In

January 2000, Cygnus Solutions was acquired by Red Hat, and Tiemann became Red Hat's chief technical officer. In 2004, he became the company's first vice president of open source affairs. He has traveled the world extensively to lecture on open source software as both a technology platform, an engine for economic development, and as an organizing principal to solve grand challenge problems.

In 2006, Tiemann applied his knowledge of open source software to music production by founding Manifold Recording, a high-end, carbon-neutral recording studio and production facility in Pittsboro, N.C.

Tiemann graduated from the Moore School of Electrical Engineering at the University of Pennsylvania, spent a summer working for The French National Institute of Computer Science in Paris and completed graduate work in electrical engineering at Stanford University. He has served on a number of boards, including the Open Source Initiative (retiring as president), GNOME Foundation and Open Source for America. He also served on the board of the Montessori Community School (retiring as president) and is serving as a Trustee at UNC School of the Arts (2012-2021).



**Ton van Welie** is the CEO Ortec Finance. As CEO of Ortec Finance since 2008, Ton van Welie oversees the daily operations of the leading, global provider of technology and solutions for holistic risk/return management for pension funds, insurance companies, asset managers and real estate managers. Ton has been part of Ortec Finance for over twenty-five years, fulfilling many different functions throughout the organisation. Over the last 10 years Ton has overseen the growth of the organisation both in solution diversity and global reach. Ton graduated in 1995 from the Erasmus University of Rotterdam with a degree in Econometrics (M.Sc.). He frequently returns to university as a guest lecturer, teaching asset

liability management, risk management and scenario analysis. In doing so, Ton embodies to the Ortec tradition of integrating academic learning and practical business sense.