

Thank you for joining us. The webinar will begin soon!

Help Desk: Select the “Help” option in the toolbar at the top of your GoToWebinar navigation panel.

Ask a Question of the Presenters: Click the “Questions” box to type a question for the presenters. Please include your name and organization with your question.

Exit the Webinar: Click the gray “X” in upper right corner of the navigation bar.

Webinar Recording: A recording of this webinar will be sent to all registrants.

Follow the Conversation: Use #Implnv on Twitter.

THE CASE FOUNDATION

MISSION
INVESTORS
EXCHANGE


COUNCIL *on* FOUNDATIONS



WELCOME!

EVERYTHING YOU NEED TO KNOW
ABOUT IMPACT INVESTING
(IN 1 HOUR!)

PRESENTED BY

The Case Foundation

@CaseFoundation

Mission Investors Exchange

@MissionInvest

Council on Foundations

@COF_





IMPACT INVESTING

WHAT IT IS AND WHY IT MATTERS

Jean Case, CEO, the Case Foundation
@JeanCase



Impact investments Are:

Investments

Made into companies,
organizations and funds

With the intention to
generate measurable social
and environmental impact

Alongside a financial return.



A RANGE OF OPTIONS IN A GROWING SECTOR

Kate Ahern, VP, the Case Foundation
@AhernKate



Common Decision Points for Investors:

1. Sector
2. Asset class
3. Geography
4. Funds vs. direct
5. Risk & return
6. Other ways to engage



01

SECTOR



Impact Sectors Include:

- Community development
- Small business finance
- Health and wellness
- Education
- Microfinance
- Financial inclusion
- Fair trade products
- Conservation
- Renewable energy
- Sustainable agriculture



02

ASSET CLASS



Asset Classes Include:

- Fixed income
- Absolute returns
- Private equity/venture
- Public equity
- Real assets



03

WHERE: GEOGRAPHY

WHERE

Emerging
Markets



Developed
Markets

- City/state
- Domestic (US)
- “Domestic emerging markets”
- Emerging markets



04

HOW: FUNDS VS. DIRECT INVESTMENTS



HOW

Structured
Products/
Funds



Direct/
Custom

- Impact investing funds
- Direct investments
- Total portfolio activation

A hand is shown holding a yellow measuring tape, with the tape extended downwards. The background is dark, and there are diagonal yellow and blue geometric shapes overlaid on the image. The number '05' is prominently displayed in a large, orange font, underlined.

05

HOW MUCH: RISK & RETURN



HOW MUCH

(RETURN, IMPACT, RISK)

Return OF
Capital



Return ON
Capital

- Blended strategies
- Market rate, with impact
- Sector-focused
- Impact alpha



06

**OTHER WAYS TO
ENGAGE**



Other Ways to Engage

- Ecosystem support grants
- Policy engagement
- Shareholder activism and active ownership
- Social impact bonds



IMPACT INVESTING IN PRACTICE

Stacy Donohue, Omidyar Network
@StacyDon

Dan Brillman, Unite US
@DanBrillo

FOR-PROFIT SNAPSHOT



Omidyar Network is:

A philanthropic investment firm, founded in 2004 by Pam and Pierre Omidyar, founder of eBay.

Dedicated to harnessing the power of markets to create opportunities for people to improve their lives.



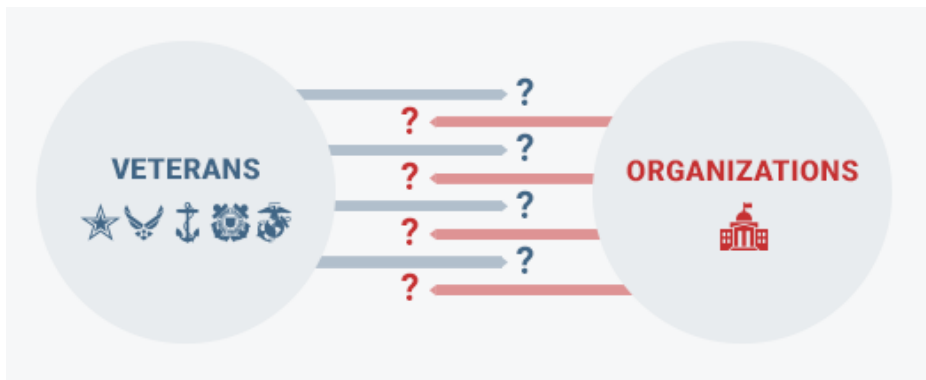
Two Key Approaches

1. A flexible capital approach: for-profit and nonprofit are complementary
2. A sector-based approach:
 - Consumer internet and mobile
 - Education
 - Financial inclusion
 - Governance and citizen engagement
 - Property rights



Omidyar Network Commitments Since Inception:

- \$391 million in for-profit investments, including Unite US
- \$458 million in nonprofit grants
- \$849 million total



Connecting a Fragmented Industry With Technology

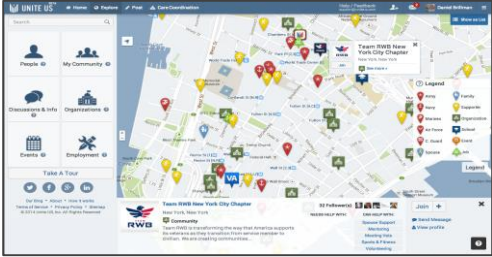
Fragmented support system
of 400,000+ organizations

Connecting military families
with local coordinated care

Technology Transforming Service Delivery

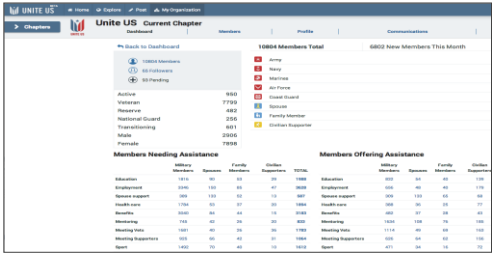
Resource Network “BOOST”

Connecting veterans to impactful local resources & opportunities



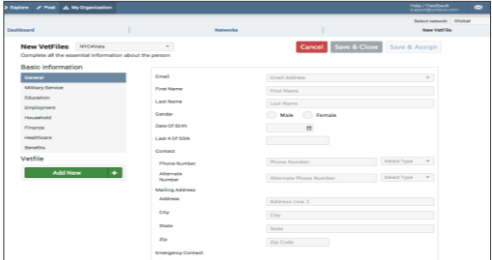
Community Management “ENGAGE”

Streamlining operations, communication, outreach, and analytics for organizations



Care Coordination “CARE”

Seamlessly coordinating services within organizations & networks of service providers





Education			Mental Health
Employment			Public Benefits Counseling
Family Support			Recreation/ Outreach
Financial Assistance			Substance Abuse
Housing			VA Benefits and Advocacy
Healthcare			Legal Assistance

Programs Already Live in Communities...

50+ public, private, nonprofit organizations streamlining care

200+ practitioners and care workers collaborating and coordinating services

Secure referrals and tracking, standardized intake, outcome reporting

Coordination increasing efficiencies, accountability, ROI and lowering costs

QUESTIONS?

If you have a question for one of the presenters, please click the “questions” box and type it in.

Please include your name and organization with your question.





Upcoming Programs

- 9/28 – 9/30: Atlanta Mission Investing Institute
- 11/12: Essentials of Impact Investing Webinar Series Part I: *Why Foundations of All Sizes Engage in Impact Investing*
- 1/21: Essentials of Impact Investing Webinar Series Part II: *Common Ways to Engage in Impact Investing*
- 3/17: Essentials of Impact Investing Webinar Series Part III: *How to Find (or Develop) Impact Investing Deals*
- 5/10 – 12: Mission Investors Exchange National Conference in Baltimore



Resources

- **A Short Guide To Impact Investing**
www.Shortguide.org
- **Mission Investors Exchange Website**
www.MissionInvestors.org
- **Essentials Of Impact Investing**
A Guide For Small-Staffed Foundations
- **Community Foundation Field Guide To Impact Investing**
- **Strategies To Maximize Your Philanthropic Capital: A Guide To Program Related Investments**
- **Learn Foundation Law: Program-Related Investment Rules for Private Foundations**