

## Impact Investing Sessions at the 2015 Annual Meeting

Sunday, April 26

### 11:15 a.m. – 12:15 p.m. Impact Investing: The Nuts and Bolts

Everyone knows about impact investing, but how do you start your foundation down a path to utilize this emerging tactic? This session will provide an interactive discussion on the tools you need to have and the initial steps you need to take with your staff and board to incorporate impact investing as part of your philanthropic strategy.

### 11:15 a.m. – 12:15 p.m. Case Study: Engaging the Next Generation on Climate Change with Divest/Invest Philanthropy

The rapid expansion of the Divest/Invest Philanthropy campaign over the past year has greatly contributed to the overall focus of foundations addressing climate change. Divest/Invest has been of particular interest to younger trustees of family foundations who have higher levels of awareness and concern about climate change, and tend to be deeply engaged in impact and mission investing.

The session will begin with an overview of the Divest/Invest effort. This session will use a case study approach to examine how two foundations, the Russell Family Foundation and the Hill-Snowdon Foundation, decided to join the Divest/Invest Philanthropy campaign. Attendees will examine the role that next generation trustees played in helping achieve this. Two trustees will also discuss how they worked with their boards and family members to change the way their foundations engaged with this issue.

### 1:45 p.m. – 2:45 p.m. Inside Divest/Invest Philanthropy: How Foundations Are Moving Minds, Investors and Assets on Fossil Fuels

Taking a case study approach, the panelists will offer candid, in-depth views of the Divest/Invest Philanthropy campaign from the inside out, including its implications for philanthropy-at-large and sustaining the planet.

We'll follow the Divest/Invest Philanthropy story from the spontaneous actions of a small group of foundations to a growing coordinated global movement in philanthropy aligning itself with other investor sectors: higher education; NGOs; faith communities; labor & pension funds.

Panelists will share the practical mechanics of board education, investment committee decision-making, managing divestment/reinvestment, and civic engagement on these matters.

**1:45 p.m. – 2:45 p.m.      Moving Deals Forward: Creating an Ecosystem for Investable Opportunities**

Not all funders are looking to create one strategy that will fix all their community's economic woes. Often grantmakers are trying to create the pre-conditions for attracting investment capital, facilitating an emerging development deal, growing a single business, or maximizing existing infrastructure. This session focuses on the realities facing foundations that are trying to attract capital and resources in order to make progress in their community.

**3:30 p.m. – 4:30 p.m.      Impact Investing and Community Foundations: What Have We Learned So Far?**

Impact investing and mission investing allow foundations to use more of their assets to create positive social change. This session will focus on how community foundations can employ these approaches in their work. Community foundations that are well-versed in impact and mission investing activities will provide insight into how they began this work and what they have learned in the process.

**3:30 p.m. – 4:30 p.m.      The Elephant in the Family Room: What are You Doing with Your Corpus?**

The business of achieving good with one's wealth has never been easy, yet we are at a unique moment in time where our money can do much more. There has been a proliferation of new investment vehicles and approaches, which make this more possible. For family foundations, new generations are showing greater interest in aligning investments with values and using all of their assets to achieve their mission.

The pathways family foundations take in learning about these options and the sometimes hard conversations that need to take place beforehand will be the focus of this session. Family foundation members will share stories about grappling with, identifying and clarifying core family (and foundation) values that could inform this new direction.

Session participants will learn about strategies to align program and investment goals, have facilitated discussions on ways to approach impact investing and will take away tools to inform these critical, exciting conversations back home.

## Monday, April 27

**11:15 a.m. – 12:15 p.m.      Impact Investing: What to Expect over the Next 10 Years**

Impact investing and mission investing allow foundations to use more of their assets to create positive social change. This session will focus on how community foundations can employ these approaches in their work. Community foundations that are well-versed in impact and mission investing activities will provide insight into how they began this work and what they have learned in the process.

For more information visit [www.cof.org/2015Annual](http://www.cof.org/2015Annual) or contact John Cochrane ([john.cochrane@cof.org](mailto:john.cochrane@cof.org) | 703.879.0634)

Tuesday, April 28

3:30 p.m. – 4:30 p.m.

**Creative Capital For the Planet: Leveraging Philanthropy Investments with Finance Partners**

When capital markets take note of social issues, the result can be a dramatic increase in awareness, impact, and behavior change of both individuals and institutions. This session will explore pathways to leverage philanthropy funds with impact capital and show the kind of power such pathways can generate. This session has a special focus on natural resource, cleantech, and agriculture investments.

For more information visit [www.cof.org/2015Annual](http://www.cof.org/2015Annual) or  
contact John Cochrane ([john.cochrane@cof.org](mailto:john.cochrane@cof.org) | 703.879.0634)