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WELCOME!
EVERYTHING YOU NEED TO KNOW ABOUT IMPACT INVESTING (IN 1 HOUR!)
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
Impact Sectors Include:

• Community development
• Small business finance
• Health and wellness
• Education
• Microfinance
• Financial inclusion
• Fair trade products
• Conservation
• Renewable energy
• Sustainable agriculture
Asset Classes Include:

- Fixed income
- Absolute returns
- Private equity/venture
- Public equity
- Real assets
03
WHERE: GEOGRAPHY
- City/state
- Domestic (US)
- “Domestic emerging markets”
- Emerging markets
HOW: FUNDS VS. DIRECT INVESTMENTS
• Impact investing funds
• Direct investments
• Total portfolio activation
• 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
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
Community Management
“ENGAGE”

Resource Network
“BOOST”

Care Coordination
“CARE”

Technology Transforming Service Delivery

Connecting veterans to impactful local resources & opportunities

Streamlining operations, communication, outreach, and analytics for organizations

 Seamlessly coordinating services within organizations & networks of service providers
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


• 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