

# ACCELERATING U.S. COMMUNITY IMPACT INVESTING:

## *Understanding Challenges and Solutions*



Supported by:  
**MacArthur  
Foundation**



### Accelerating U.S. Community Impact Investing Agenda

January 31, 2018 | Chicago, Illinois

The Global Impact Investing Network (GIIN) and The National Community Investment Fund (NCIF) in partnership with the John D. and Catherine T. MacArthur Foundation, are pleased to host a meeting of impact investors - institutional investors, foundations, advisors, and wealth managers - interested in investment opportunities in the U.S. Specifically, the meeting aims to explore and address challenges to increasing impact investment capital in U.S. community investing (USCI) by:

- Framing the key challenges and solutions to increasing impact investing allocations to USCI;
- Discussing potential solutions to these challenges by testing USCI investment products with diverse investors to ground conversation in real examples; and
- Engaging asset owners, advisors, and wealth managers new to the USCI space to understand investment appetite and preferences and to provide exposure to emerging investment opportunities on the product landscape.

#### 8:00am Registration and Peer Networking over Breakfast

#### 8:50am Context-Setting by NCIF | Saurabh Narain, *President and CEO*, NCIF

NCIF will provide [context](#) for the need to focus on deep, comprehensive and measurable community investing to solve long-term structural problems and therefore to bring in different capital stacks to communities.

#### 9:10am Context-Setting by The GIIN – The State of U.S. Community Investing | Allison Spector, *Senior Manager*, GIIN

GIIN staff will present the most up-to-date report of the U.S. Community Impact Investing Market – drawing on insights from reports on [progress](#), [performance](#), and [practice](#). The GIIN will also showcase the newly launched [Navigating Impact Tool](#), an effort to help investors select strategies and adopt metrics that indicate performance toward their goals.

#### 9:30am A Tale of Two Cities – Place-Based Investment Strategies

Despite decades of investing by the government, private sector, and private wealth, many U.S. cities struggle to support resilient economies. This session will explore some of the strategies that have worked and how investors are working together to bring in long-term change.

**William Carson**, *Vice President and Director*, infUSE<sup>TM</sup> U.S. Bank  
**Kimberlee Cornett**, *Managing Director*, Social Investment Practice, Kresge Foundation  
**Alden McDonald**, *President and CEO*, Liberty Bank

#### 10:30am Break and Networking

#### 11:00am Systems Change – Effective Impact Investing Through Systems Thinking

This panel discussion will explore how impact investors think about a systems-level approach to investing and bringing in different kinds of capital to strike at the root causes of persistent poverty.

**Bill Burckart**, *President and CEO*, The Investment Integration Project  
**Lara Metcalf**, *Managing Director*, Social Finance

#### 12:00pm Keynote Address, Lunch and Peer Networking over Lunch

#### 2:00pm Product Structure Lab – Testing Emerging Solutions in U.S. Community Impact Investing

Fund managers/organizations will present their investment vehicles in front of diverse panels of asset owners and their advisors to receive feedback. This will inform the sound design of U.S. Community Impact Investment vehicles, educate asset owners about the range of products in the market, and test interest in specific products that have the potential to gain traction and be capitalized on in 2018 and beyond.

**Calvin Holmes**, *President*, Chicago Community Loan Fund  
**Anne McCulloch**, *CEO*, Housing Partnership Equity Trust  
**Kerwin Tesdell**, *President*, Community Development Venture Capital Alliance

Please click [here](#) for the guidelines to be considered to present.

#### 4:00pm Fireside Chat with Leaders in Impact Investing

**Bridget Gainer**, *Commissioner*, Cook County and *Founder*, Cook County Land Bank  
**Tim Schwertfeger**, *Chairman Emeritus*, Nuveen Investments

#### 5:00pm Cocktail Reception and Networking