

# Impact Investor Forum

## Virtual Experience 2021

Virtual, 24-26 May 2021

*Timings are in BST – London, UK. Please note this is a draft, topics and timings are likely to change as we move closer to the conference.*

### **Pre-conference workshops – Monday 24<sup>th</sup> May**

13.00-14.15 LP workshop: an investor guide to impact allocation, metrics, and methodologies

14.20-14.40 *LP-GP virtual speed networking*

14.45-16.00 GP workshop: starting your first impact fund – the do's and don'ts

### **Day one – Tuesday 25<sup>th</sup> May**

10.45-11.00 Opening remarks

11.00-11.30 **Keynote: Raising a multi-billion \$ impact fund**

11.35-12.15 **LP panel: aligning with investors' risk, return and impact targets**

Get a view across the investor spectrum, from mission-driven endowments, pensions, insurance and sovereign wealth, on what matters most to them when it comes to impact and their perception on the range of impact product offerings currently on the market:

- How do investors such as pension funds need to adjust their mandates to account for impact performance?
- What are the risk/return expectations and are return concessions really off the table when looking at impact funds?
- What data do investors want to see and which frameworks are they using to guide their information demands?

12.20-13.00 **The route to scaling impact: dedicated funds vs integration with ESG?**

- Learn the different routes that funds have taken to their impact approach and how they believe they will achieve impact
- Listen to a debate on the role of ESG and impact blending in moving progress forward and what the evolution of these strategies will look like
- Understand the outlook of fund managers and where they are focusing their time and resources, and how they are staffing their effort

13.00-13.45 Lunch

13.30-13.45 *Virtual speed networking*

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- 13.45-14.15     **Keynote: when will the impact LP become the mainstream?**
- 14.20-15.00     **Impact methodologies: will measurements reach a financial reporting standard and what to do in the meantime?**
- Get an overview of the progress to harmonising impact management and measurement methodologies
  - Learn what frameworks leading impact funds are using to demonstrate impact as well as implement continuous improvement
  - Listen to debate on how data, metrics and methodology will develop in the next 5 years as the sector matures and where is innovation required
- 15.05-16.05     **Thematic, specialist impact discussion**
- During this one-hour period, we give the attendees a range of options of sessions which they can attend. This is your opportunity to get involved in the discussion and networking with professionals working on challenges in a similar context.
- The sessions will go into more details on thematic areas that have emerged in impact investing such as:
- Climate and energy transition
  - Emerging markets
  - Circular economy
  - Gender-lens
- 16.10-16.50     **Social impact and gender-lens investing: what are the lessons learnt?**
- What are the KPIs you need to consider when looking to implement a social impact goals such as female empowerment?
  - What are the key challenges gender-lens impact funds have come across?
  - Are there frameworks that simplify the process?
- 16.50             End of day one

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### Day two – Wednesday 26<sup>th</sup> May

11.00-11.40 **Defining the strategy and intentionality of an impact fund**

In this opening panel session, we hear fund managers discuss the how they define the fundamental goals and strategy of their impact efforts. The presentations will give insight on how impact funds approach performance metrics, source opportunities, undertake due diligence and ensure their performance is underpinned by scientific, empirical methods to ensure data is credible.

The session will include investor commentary and the audience will be able to provide feedback through polling on their preferred strategy.

11.45-12.25 **How to get your impact data strategy right**

- There is a plethora of impact frameworks to use so how do you go about deciding which mix of them you will apply?
- Is it likely that these methodologies will be harmonised and if not, what should you do to ensure you are still moving forward?
- How to know which standards are both right for your fund and will resonate with investor needs?
- What open sources frameworks have fund managers developed and to what extent should you create your own methodologies?

12.25-13.30 Lunch

13.00-13.30 *Virtual speed networking*

13.35-14.15 **Reporting outlook: emerging legislation and regulations for impact and ESG disclosure**

- Understand future transparency regulations and how to align with upcoming legislation such as the EU taxonomy
- Ensure your efforts on reporting are future-proofed for the standards expected by key jurisdictions as well as investors
- Learn where the key legal risks are when making impact claims and how efforts to stamp-out ‘impact washing’ will evolve

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**14.20-15.00      Creating a credible impact roadmap for investments**

- Considerations when scaling impact vs impact ‘turnaround’ situations – to what extent do you need to take a different approach?
- How do funds influence portfolio company management to deliver impact performance through incentives and human resource strategy?
- What qualitative analysis and quantitative metrics should you have in place to facilitate continuous improvements?
- Value creation plan vs impact creation plan – to what extent to do these need to be integrated?
- What support do you need to provide for portfolio company management?

**15.05-16.05      Impact in private asset classes**

During this one-hour period, we give the attendees a range of options of sessions which they can attend. This is your opportunity to get involved in the discussion and networking with professionals working on challenges in a similar context.

The sessions will go into more details on case studies and approaches within the four main classes of private market investments:

- Real Estate
- Infrastructure
- Private Equity
- Private debt

**16.10-16.40      Portfolio company management panel: is impact a data burden or a financial opportunity?**

- Hear from three CEOs of PE-held portfolio companies discuss their challenges when implementing an ‘impact plan’ mandated by a GP
- Understand what the main challenges are when trying to balance demands for both impact and financial performance on the ground
- What are the main headaches in delivering KPI data to a fund manager?

**16.40-17.00      Closing remarks**

**17.00              End of conference**