



# First Working Conference

## Building the Standard for Return on Impact Investment (ROII)

### Why we need a Working Conference on Metrics & Standards

According to the US Forum for Sustainable and Responsible Investing (2016) one in five dollars of total managed assets is focused on sustainability growth investments. Specifically, \$8.10 trillion in US-domiciled assets held by 477 institutional investors, 300 money managers and 1,043 community investing apply various ESG criteria in investment analysis and portfolio selection.

*However, a recent survey indicates over 150 models are used among these impact investors for assessing their Return on Investment (ROI).*

*This leaves the emerging impact investment market fragmented and misaligned.*

*Insiders suggest that the absence of a standard has contributed negatively to the growth and sustainability of this new financial market sector.*

With no standard metric and no universally accepted method to quantify impact of an investment dollar on People, Planet, Profit, and Purpose (P4), financial managers drive investment decisions on instinct and implied logic.

The lack of a standard ROII metric prevents emergence of an independent third party verification framework to support and facilitate investor interest in making money while doing good.

## Objectives of the First Global Working Conference

This Conference is planned to address four pressing issues restraining investors, who have ample assets to invest, and their investment managers, who have the responsibility as well as accountability for Return on Impact Investment. This first working conference will begin to determine:

Objective #1: **Metrics**, identifying key factors for success while reducing risk

Objective #2: **Best Methods and Practices** assessing/evaluating data

Objective #3: **Standards** that can be used globally by investment community

Objective #4: **Framework** for future Alignment/Collaboration within the sector

**The global market demonstrates both a need and want for an industry standard.**

***This conference offers thought leaders early opportunity to join in a Leadership role in defining AND building the next gen ROII and creating the financial impact standard.***



## About the Sponsors

[Mount St. Mary's University](#), in collaboration with the [International Collaborative Leadership Institute](#) and sponsorship from **Innovation Works**, has undertaken the task of designing and building a new financial tool which evaluates the Return on Impact Investment (ROII).

We expect the new econometric model, reflective of the UN's Environmental, Social and Governance (ESG) criteria, built on best practices, will become the standard for evaluating ROII.

## About the Attendees

The work of building this model will start by bringing together an international group of thought leaders representing developmental economics, sociology, finance, impact investing, international development and high level econometric technology driven modeling.

The first working conference of thought leaders in ROII methods, data, international standard setting, collaborative capitalism, and alliance development is set for September 20 - 22 in Baltimore, Maryland.

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For information send inquiries to [info@iclinstitute.org](mailto:info@iclinstitute.org)

See [Return on Impact Investment](#) for more information

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# AGENDA

## Day 1

<b>Overview</b>	9 – 9:30	Introduction to the Conference Why Who What When How The Challenge	<b>Christine Adamow, MBA</b>
<b>Ground Rules</b>			
<b>The Challenge</b>	9:30 – 10:30	State of the Art - Summary Impact Investment: Method, Data, Global Market  Market Segmentation Opportunity	<b>Alejandro Cañadas, PhD Christine Adamow</b>
<b>Methodology</b>	10:30 - 1:00	How do we proceed to create a Unified Methodology? What are Obstacles to Adoption? What is our role at researchers? Thought leaders? Stewards? What does the market want? What are our needs? Framework; mathematical approaches What are the comps?	<b>Michael Knapp, PhD  Mark Anielski, PhD</b>
LUNCH	1:00 – 2:30	Networking BOX Lunch  Tour OPEN WORKS Baltimore (social impact incubator)	
<b>Creating the Standard</b>	2:30 – 5:00	Why a standard?  What Value are we creating?  Process of getting a standard adopted  Example ISO 44001: The need and the journey for creating standards	<b>Michael Leonetti, MS  The ISO Standards Journey</b>
<b>THE CHALLENGE</b> Working groups			
	5:00 – 6:30	Wine Reception Continue discussions from today's learnings over local wine and horderves	<b>OPEN WORKS Baltimore</b>

## Day 2

<b>Day 2 Friday September 21</b>	8:30-9:00	Breakfast at Open Works	
<b>DATA</b>  Working groups	9:00 – 12:30	<ol style="list-style-type: none"> <li>1. What do we have?</li> <li>2. What do we need?</li> <li>3. How do we use it?</li> <li>4. What are the challenges?</li> <li>5. Why?</li> </ol>	<b>Tim Shaler, MBA</b>
LUNCH	12:30 – 1:30	Networking Box Lunch	Open Works
<b>Collaborative System Development</b>	1:30 – 5:00	<ol style="list-style-type: none"> <li>1. Collaborative Capitalism – the elements</li> <li>2. Alliance / Collaboration</li> <li>3. Key factors for successful collaboration</li> <li>4. How do we build and deploy?</li> </ol> <p style="text-align: center;">1+1-3</p>	<b>Robert Porter Lynch, MEd – Collaborative Organizational Systems</b>
	6:30 PM	DINNER @ Revival Hotel 1+1=3	KEYNOTE Frank Knott President Innovation Works

## Day 3

Day 3	8-9	Breakfast at Revival Hotel	
9:00 – 12:00	9-10	What do we have now?	Christine Adamow
<b>Working group</b>		Action Planning Workshop	Alejandro Canadas
<b>Wrap up</b>		Review Process Plan Next	