



Impact Investing with a Gender Lens

DRAFT AGENDA

Monday, September 9, 2019
Breakfast at Fuqua School of Business
<p>1. Welcome and Introduction to Gender Smart Investing Overview of current state of the field, including the most common gender-based lenses and theories of change, terms, and frameworks.</p>
<p>2. Your Goals We meet everyone in the room, and learn about each other's motivations, goals, experience, and expectations around gender lens investing.</p>
<i>Break</i>
<p>3. Understanding the Ecosystem of Gender Lens Investing Participants understand the breadth of the Gender Finance Ecosystem Map, where they sit on the map, and relevant nodes and information flows</p>
<p>Lunch at Fuqua School of Business Supplied by a local, woman- and minority-owned catering company</p>
<p>4. Investing in Public Market Funds with a Gender Lens What you can achieve in a public fund – both equity and debt – around gender issues? What data is available and how accessible is it? How you can talk to portfolio managers about how they are engaging with gender? How you can combine a gender lens with other criteria (e.g., fossil free)? What are the pros and cons of holding versus selling, and the role of shareholder engagement? Participants will practice evaluating sample public funds according to gender lens criteria.</p>
<i>Break</i>
<p>5. Investing in Private Market Funds with a Gender Lens What defines a gender positive fund, including what kind of capital come in and what kind of capital goes out as investments. How do you conduct due diligence to determine what funds align with your goals? What you can do to influence a fund you already own? What happens when starts with a gender lens mandate vs. building it in as corollary to another mandate? How do you handle pre and post decision-making? Participants will practice evaluating sample private funds according to gender lens criteria.</p>
Reflections on the day and Q&A
Dinner at JB Duke Hotel Restaurant

Tuesday, September 10, 2019

Breakfast at Fuqua School of Business

Recap of Day 1, Overview of Day 2, and Q&A

6. Direct Investing with a Gender Lens

How do you analyze a company from a gender perspective according to the lens or theory of change selected? How can you integrate gender into different stages of the investment process? What kinds of data or conversations can you have with entrepreneurs and what lessons are there from experienced investors about how to work productively with companies to improve their practices? Participants will practice diligencing private companies according to gender lens criteria.

Break

7. Impact Measurement and Management: State of the Field Today

What are the fundamentals of Impact Measurement and Management, and what is state of practice emerging in the field right now? Will include time to reflect on what you are trying to achieve and where you sit on the spectrum of IMM, considering what is efficient and effective, what your stakeholders want, if you are driving or passive, etc. What are the best tools and practices you can use to support your strategy, communicate with stakeholders and improve performance?

Lunch at JB Duke Hotel

8. Upping Your Game in Your Current Portfolio

What can do with your current portfolio, using your influence as a shareholder, LP in a fund, or investor in a company to improve gender support? How can you identify opportunities around products and services, value chains, internal policies and practices, leadership and governance, etc.?

Break

9. Developing Your Strategy

This session will be a guided self-reflection activity as we help you develop your own 12-month gender lens strategy. What is your overall goal and what steps can you take to make it happen? What do you most want to do on public side and private side? What is still stymieing you? What are you worried about? What do you need to learn more about? What do you need help with? Participants will emerge with a written outline of their own plan with documented next steps.

Break

Dinner in Downtown Durham

Dinner is on us at one of Downtown Durham's restaurants, with tables reserved for small groups.

Wednesday, September 11, 2019

Breakfast at Fuqua School of Business

10. Share Your strategy

Share your strategy in small groups, get feedback, and then discuss overall learnings as a group.

11. How to Continue

In this session, we will present standard resources, consultants, tools as well as provide customized advice for participants on best ways to take next steps to meet their goals.

Lunch, Reflection, and Closing

Boxed Lunches ready for your departure