

WHAT IS IMPACT INVESTING?



The concept that strategically invested capital can generate **both** a positive measurable social outcome and a financial return.



Omaha Community
Foundation

Good grows here.

**THIS IDEA
IS NOT NEW**



**Omaha Community
Foundation**

Good grows here.

**SOCIALLY
RESPONSIBLE
INVESTING (SRI)**



**ENVIRONMENTAL,
SOCIAL &
GOVERNANCE
INVESTING (ESG)**



**IMPACT
INVESTING**



THE MARKET IS EXPANDING



Investors include individual investors, fund managers, foundations, family offices, banks, pension funds and insurance companies and religious institutions.



Omaha Community
Foundation

Good grows here.

IMPACT INVESTING CORE CHARACTERISTICS



Omaha Community
Foundation

Good grows here.

Impact Investing

The concept that strategically invested capital can generate both a positive measurable social outcome and a financial return

- **Intentional**
- **Financial Return Expected**
- **Range of Return and Assets Classes**
- **Impact Measurement**



IMPACT INVESTING EXAMPLE



Omaha Community
Foundation

Good grows here.

INVEST



A foundation loans \$500,000 to a local organization to build affordable housing.

INCOME



Then over the next five years receives interest payments on the loan.

IMPACT



Resulting in new affordable housing units in our community.

REPEAT



At the end of the 5 years, the foundation receives back its original investment. Those funds can be redeployed for a new project.

INTRODUCTION TO FOUNDATIONS



Omaha Community
Foundation

Good grows here.

Private Foundations

- Created by a wealthy individual, family, or corporation
- Focused on single issue

Public Foundations

- 501(c)(3) public charity
- Community Foundations focus on wide range of issues in a specific geographic region

**Generous
People**



**Charitable
Funds**



**Grants to
Nonprofits**

Omaha Community Foundation's Impact in 2020



Omaha Community
Foundation

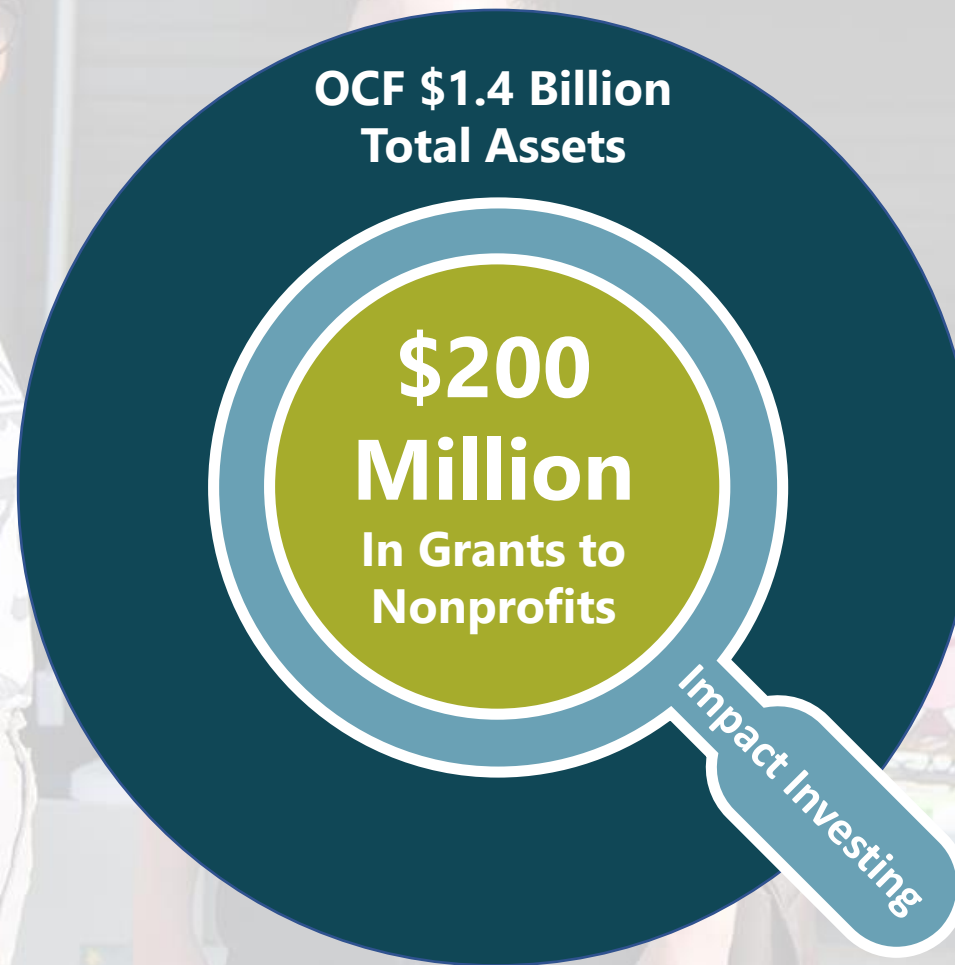
Good grows here.

ANOTHER TOOL IN THE TOOLKIT



Omaha Community
Foundation

Good grows here.



THE COMMUNITY LOAN FUND



Omaha Community
Foundation

Good grows here.

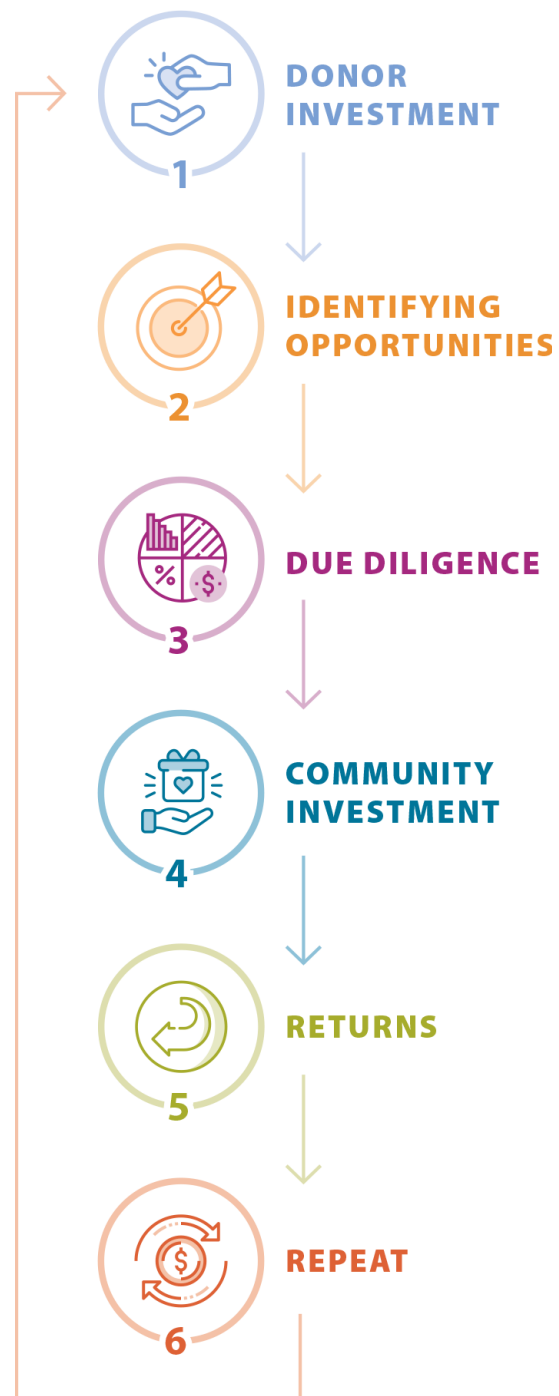


HOW ARE LOANS MADE?



Omaha Community
Foundation

Good grows here.



LOCAL INVESTMENT IN NATIVE360



Omaha Community
Foundation

Good grows here.



**\$200,000 loan
at 1.75% for 5 years**

- Provide affordable credit, capital, technical assistance.
- Promote access to loans and training.
- 80% of borrowers are low-income.
- 57% of Omaha borrowers are female.
- Nearly all borrowers are tribal-enrolled Native Americans.
- Loans created or retained 74 jobs in 2019.

QUESTIONS AND DISCUSSION

For More Information Contact
Kelli Cavey, Director of Donor Services
kelli@omahafoundation.org
402.614.9510



Omaha Community
Foundation

Good grows here.