



# Impact Investing

## Discussion Guide

### Let's review

*At the start of each discussion, review the conversation ground rules for returning and new members alike to set the stage for active participation by all. You may want to use a timer as you go around the room.*

*And don't forget to decide who will take notes and post a discussion recap.*

- **Be open and curious:** Everyone has a unique perspective, so listen and be prepared to hear a different point of view. Remember, you do not need to share your political affiliation; this is a discussion and exchange of ideas, not politics.
- **Be respectful and engaged:** Be sure that everyone has a chance to speak before adding a second comment or perspective. Encourage each other's participation.
- **Be focused and concise:** Keep the conversation centered on the issue and the brief.

**The "Table-it" Rule:** If the group has gone off-topic but the area is of interest, the group can table the conversation and save it for another time to be addressed in a different manner.

### Let's begin

- Take five minutes to review the [Executive Summary](#) for this brief. Highlight the main point of each section and key statistics.
- Each member is invited to answer the following questions in a **two-three minute reaction** to the brief:
  - Introduce yourself, and share what "lens of care" did you wear when reviewing this brief (e.g. personal, professional, community, state, nation, global)?
  - What did you find most interesting or surprising from reading the brief? What matters?

### Spread the word: facts to share during your discussion

- The 3 key components of impact investing are having the **intention** to make positive change through investing; gaining **financial return** on capital; and **measuring impact** by tracking performance metrics.
- ESG investing accounts for about one-third of total U.S. assets under management, a total of about [\\$15 trillion](#). The global total of assets based on ESG criteria is over [\\$35 billion](#).
- In 2010, fewer than 20% of companies on the S&P 500 index [published sustainability or corporate responsibility reports](#). By 2021, 92% of S&P 500 companies published these reports.

## Let's discuss

*Below are questions for the group to consider and discuss, or choose your own.*

- **Community:** What are your personal values or community values? What steps would you need to take to make an impact in your community?
- **Government:** How much of a role should the government play in the realm of impact investing? Does this differ at the federal, state, and local levels?
- **Business:** How can businesses be more transparent in their ESG reporting? Is there a balance with transparency and how difficult it may be for businesses to track their metrics?

## Let's act

1. **Take it local.** Talk to neighbors, friends, and family. Ask for their views and perspective on ESG investing, if they have considered such investments, or if they have them. Consider hosting another conversation with other community members.
2. **Explore the impact of legislation related to impact investing.** Determine what legislation may exist in your state or municipality by exploring the business page on your state or county website. See [this publication from Urban Institute](#) on how to engage with policymakers.
3. **Investigate community programs** in your state or municipality. Find a Community Development Financial Institution near you with these locators from [Opportunity Finance Network](#) and [Bank of America](#).
4. **Research your elected representatives' positions** on impact investing, and their vision for how to tackle related social and environmental challenges using the financial system. You can find contact information for federal, state, and local government officials [here](#). Your state or municipality's websites will also have information to contact leaders. Try looking at the drop-down menu for a *Government* tab.
5. **Establish a relationship with your legislators.** It's easy to establish a relationship with your legislators. Start by introducing yourself. You can also learn to write to your representatives or set up a meeting with a legislator on [The Policy Circle website](#).
6. **Consider writing a letter to the editor or an op-ed on your stance on impact investing in your local paper.** Learn how on [The Policy Circle website](#).

## Next Steps for Your Circle

- **Post a Recap:** Summarize your discussion to share thoughts with members not present, and share planned actions from group members. Designate who will post a meeting recap on your circle page.
- **Decide your next meeting topic.** Want to discuss a related brief at your next meeting? Suggestions include:
  - [Energy and Environment](#)
  - [Water and Power](#)
- **Dive Deeper into the issues.** If this is an area you would like to pursue further, consider taking possible steps to influence policy. The Policy Circle offers resources for [developing a message about your issue](#) and [organizing a petition](#) to amplify your voice and raise awareness. Don't miss our [latest events](#) that help you dive deeper on this issue and more.