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SYMPOSIUM



We'll begin shortly ...

2022

Publication Date: September 29, 2022

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BACK TO

THE FUTURE.



SEPT. 29TH, 2022

10:00 AM - 2:00 PM CDT



**ATTEND VIRTUALLY OR LIVE
FROM SELECT ARMANINO OFFICES.**

AUSTIN | CHICAGO | DALLAS | ST. LOUIS | PHILADELPHIA



▶SEARCH▶TR/01▶03

WELCOME

Jeff Owens
Armanino Partner and
Nonprofit Industry Group Leader

LEARNING OBJECTIVES

During today's event we'll:

- Discuss how to use futurism in your day-to-day work and identify trends before they happen
- Examine the ways embracing digital transformation can maximize your mission effectiveness
- Identify how to answer environmental, social and governance questions for your board and stakeholders who want to engage with your organization
- Explore the role data and analytics can play in furthering your mission

CPE Information

Program Level: Basic

Recommended CPE: 4

Field of Study: Accounting –
Governmental

Advanced Preparation: None

Prerequisites: None

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COURSE AGENDA

10:00 a.m.	Welcome
10:10 a.m.	Keynote: Now Is the Time for Future Thinking
11:00 a.m.	Break – Announcements
11:10 a.m.	Thinking Fourth Dimensionally: Strategy and Digital Transformation
12:00 p.m.	Break – Announcements
12:10 p.m.	Create Your Future: Environmental, Social and Governance (ESG)
1:00 p.m.	Armanino Foundation Break
1:10 p.m.	Your Destiny: Social Impact & Data Analytics
2:00 p.m.	Closing

All times above in Central Standard Time

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Now is the time for
FUTURE THINKING

*with Trista Harris
Philanthropic Futurist
& President of FutureGood*



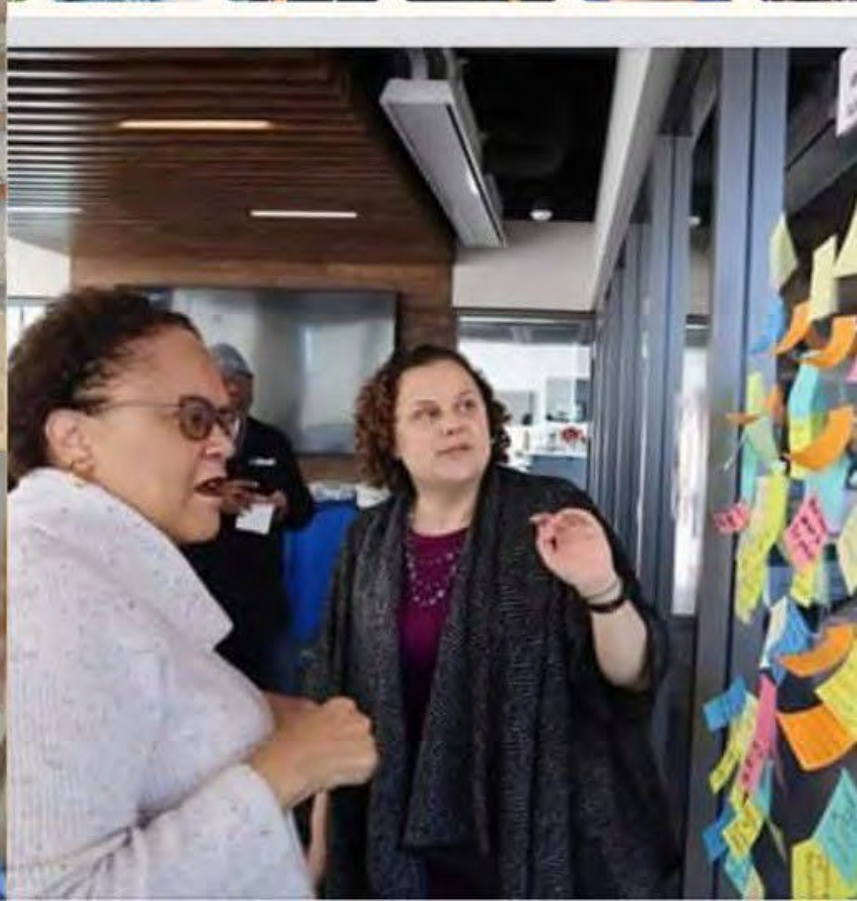
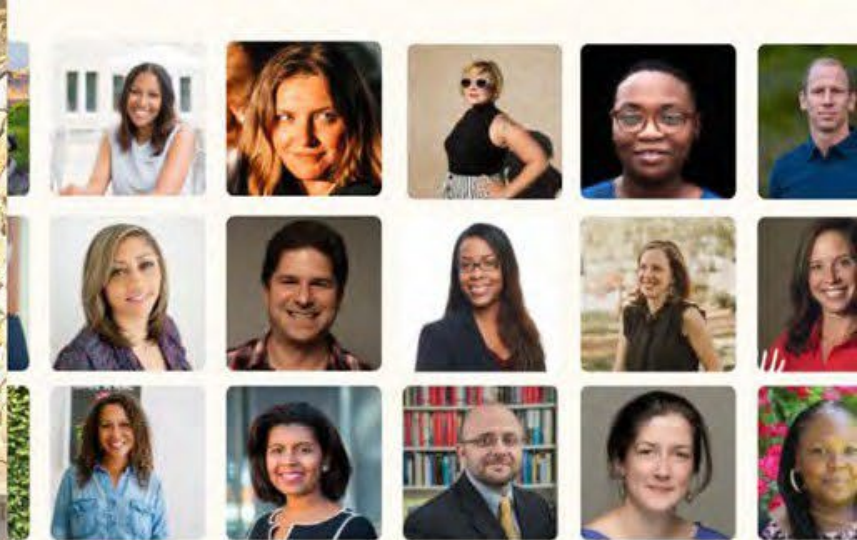
Philanthropic Futurist and President of FutureGood

Learn more at www.TristaHarris.org





**Helping visionary
leaders build a better
future through
strategic visioning,
retreats, cohort
programs, and online
learning programs**



POLLING QUESTION #1

How familiar are you with the concept of futurism?

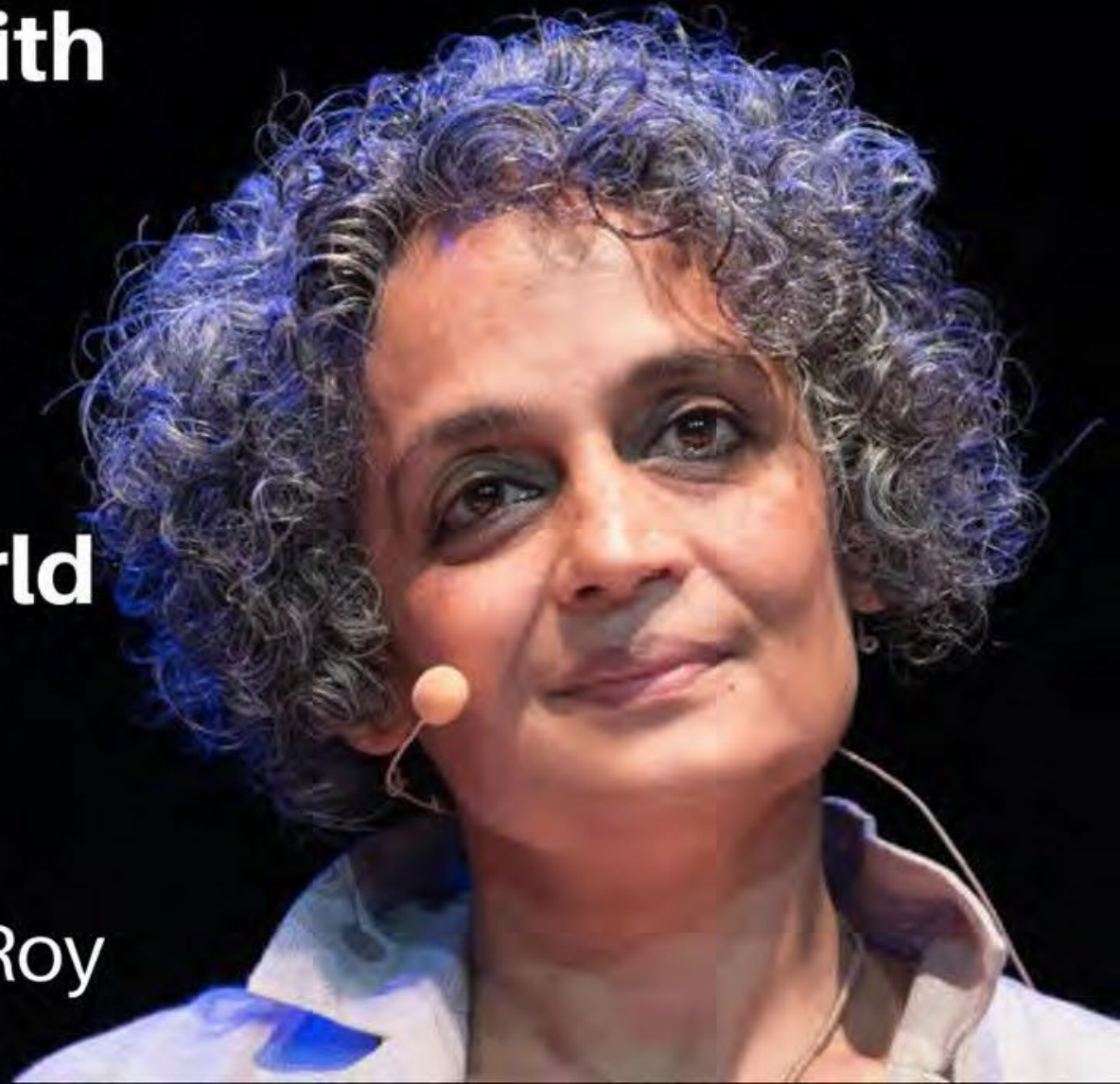
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"Historically, pandemics have forced humans to break with the past and imagine their world anew. This one is no different. It is a portal, a gateway between one world and the next."

- Arundhati Roy



Movement

Moment



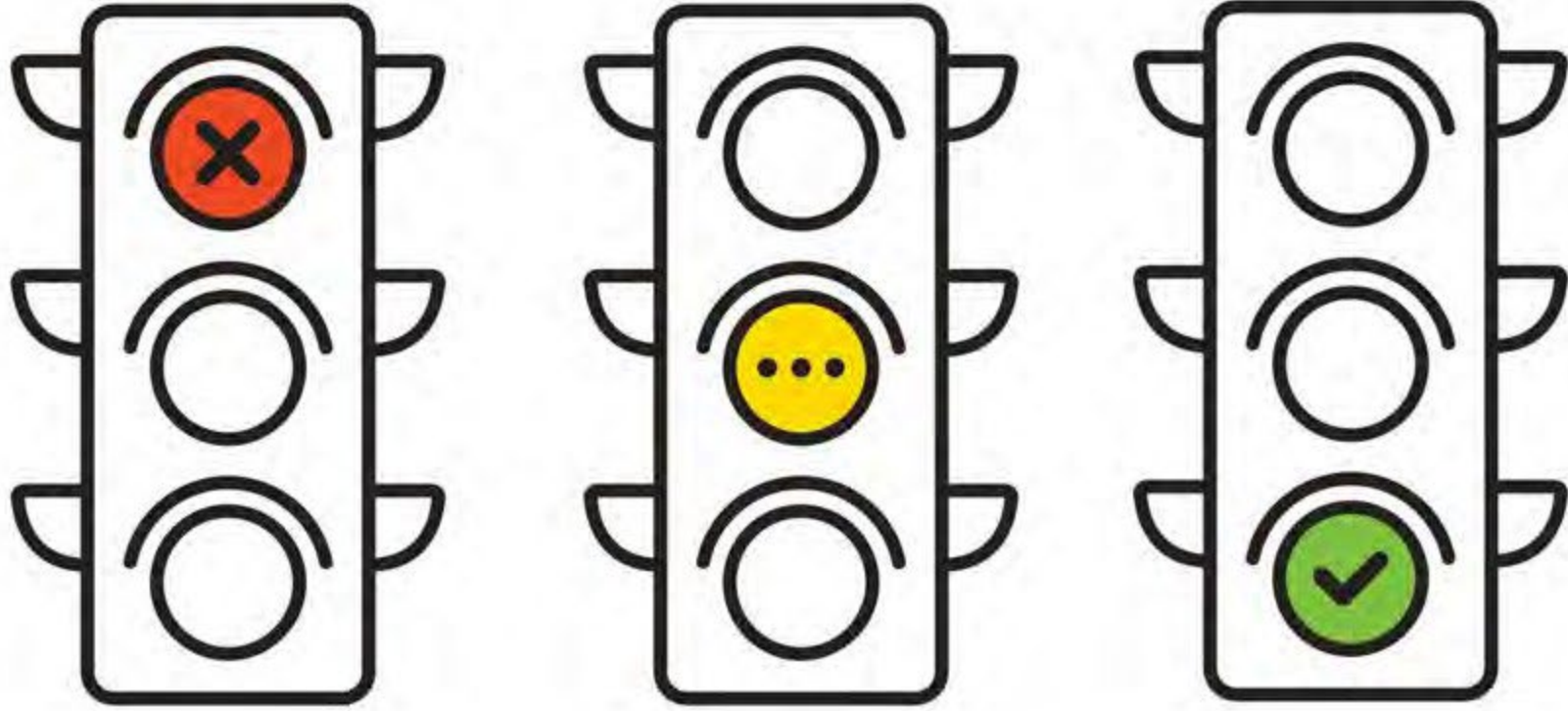
POLLING QUESTION #2

Do you find yourself stuck on problems and unable to develop a “solutions mentality” as it relates to future issues impacting you and your organization?

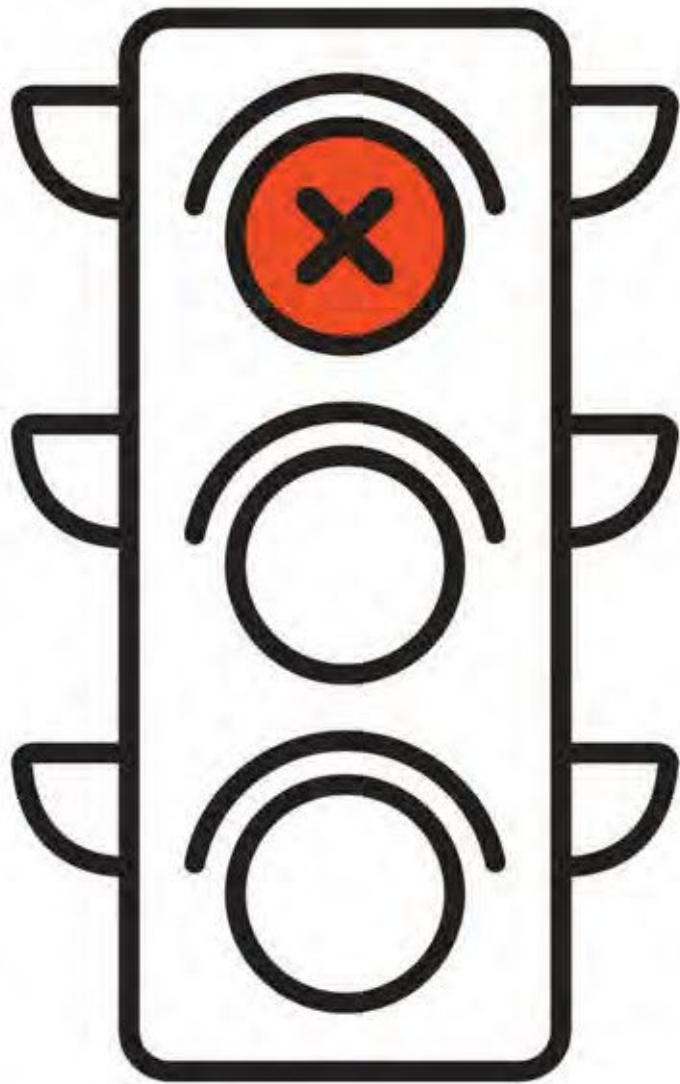
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STOP, LOOK & GO

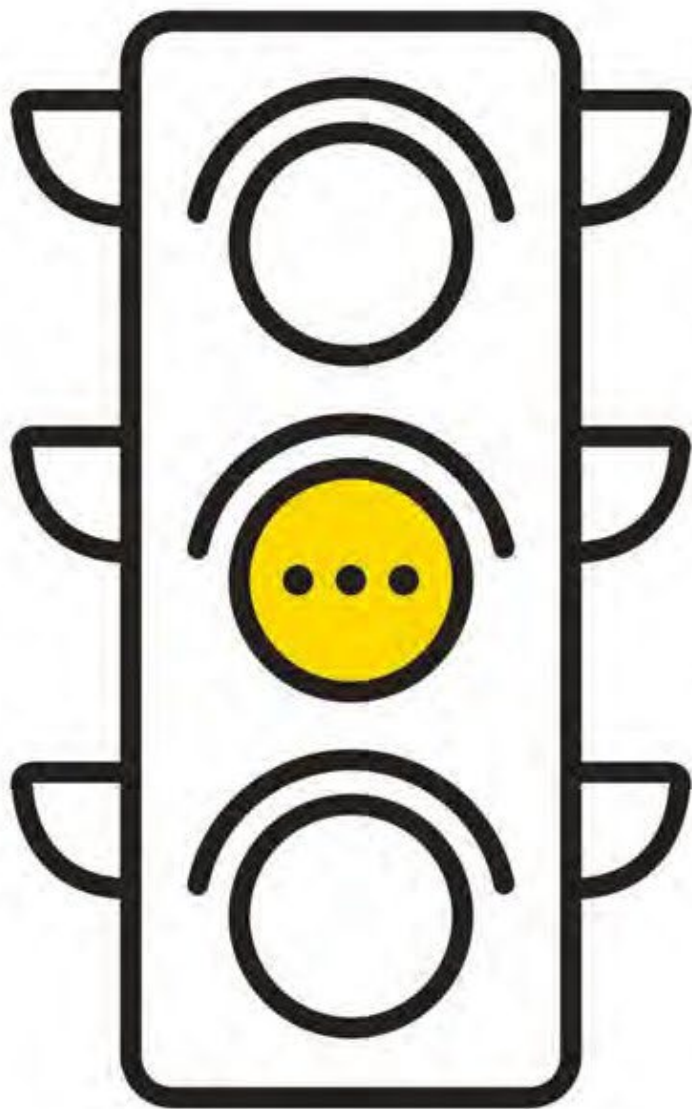


STOP



In your
IDEAL FUTURE

**what does the impact of your
work look like in 30 years?**



LOOK



**"Today is giving
you clues about
tomorrow."**

- David Burrus



**Disruption is
the Norm**



FIGHT TODAY
FOR A BETTER
TOMORROW

The image shows a close-up of a protest sign made of three pieces of cardboard. The text is written in large, bold, black capital letters for 'FIGHT TODAY' and 'TOMORROW', and in a smaller, red, cursive script for 'A BETTER'. The sign is held up by a person, and the background is a blurred crowd of people at a protest.

A Call to

Accountability



Skills for

The Future



Reimagining Cities

POLLING QUESTION #3

When do you think flying cars will become a reality?

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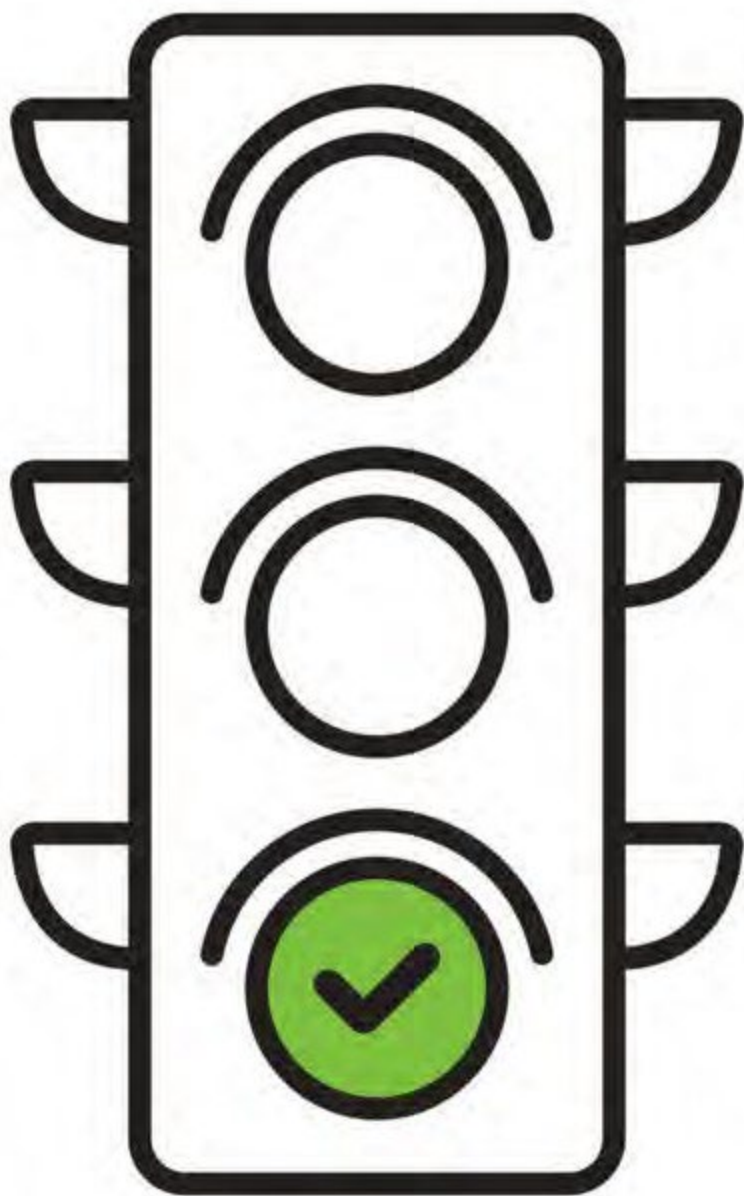
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Reimagining Cities



New Impact Tools



GO

POLLING QUESTION #4

In my current position, I feel empowered about helping my organization move toward a positive future.

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The background of the image features a stylized mountain range. The mountains are depicted in various shades of blue and purple, creating a sense of depth and atmosphere. The sky above the mountains is a deep blue, which transitions into a vibrant purple towards the bottom of the frame. The overall effect is a serene and modern landscape.

Q & A

**THE BEST WAY
TO PREDICT
YOUR FUTURE IS
TO CREATE IT**

ABRAHAM LINCOLN





WE TEACH SOCIAL SECTOR
PROFESSIONALS TO USE
FUTURISM TO PREDICT AND
SHAPE THE FUTURE.

- Learn at your own pace from philanthropic futurist, **Trista Harris**.
- **Network** with other future-focused social sector leaders.
- Deepen your learning with a **Mastermind Team**.

Cohorts start in January, May, and September.

Learn more at WeAreFutureGood.com

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BREAK

**The next session will begin
at 11:00 a.m. (CT)**

Thinking Fourth Dimensionally: Strategy and Digital Transformation

Today We'll:

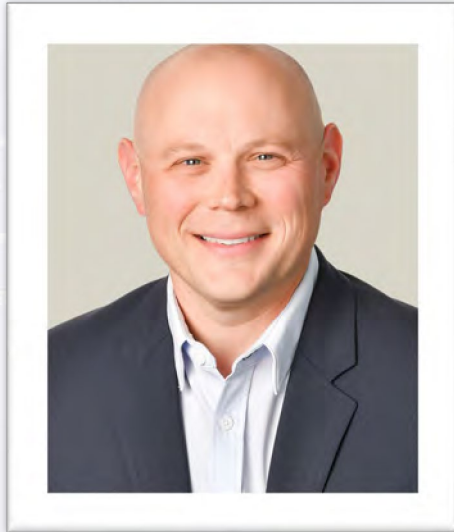
- Examine what strategy and digital transformation are
- Discuss the role technology plays in improving operations for your organization
- Learn the ways embracing change equips organizations with the tools to successfully navigate disruption

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Presenters



John Stewart

Partner

Armanino Advisory LLC



Thomas Brewer

Ralph M. Parsons Foundation
VP, Finance & Administration



John McBride

Nasher Sculpture Center
CFO

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POLLING QUESTION #5

I have a firm understanding of my organization's strategic vision and believe we are structured for future success.

POLLING QUESTION #6

Do you have a wide understanding of technologies like AI and robotic process automations can improve your efficiencies and operations?

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Future Proofing



Embracing Change



Navigating Disruption

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POLLING QUESTION #7

True or False: I believe having a future focused technology strategy will be critical to my organization's continued success.

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POLLING QUESTION #8

True or False: We should be talking more regularly about disruption with our management teams and board members in the future.

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BREAK

**The next session will begin
at 12:10 p.m. (CT)**

Create Your Future: Environmental, Social and Governance (ESG)

Today We'll:

- Analyze the three key components of ESG
- Be prepared to answer the ESG questions your Board members are asking
- Correlate the value of ESG for the future of your organization and your career

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Mary Tressel

Armanino Senior Director, Strategic Initiatives

- Former PTA President, Holbrook Elementary
- Launched Armanino Foundation in 2016
- Led Armanino's journey to achieve B Corporation Certification
- Serve as the ESG Sector Leader for Moore Global



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POLLING QUESTION #9

What does ESG stand for?

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Three Components of ESG

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SUSTAINABLE DEVELOPMENT GOALS



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What is ESG?

Environmental

- ✓ Greenhouse Gas Emissions
- ✓ Water & Waste Impacts
- ✓ Procurement



Social

- ✓ Labor Standards
- ✓ Diversity and Inclusion
- ✓ Community Impact

Governance

- ✓ Stakeholder Model Implementation
- ✓ Board & Management Structure
- ✓ Cybersecurity/Customer Data Privacy

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Who Cares?

Everyone!

- Beneficiaries
- Employees
- Donors
- Volunteers
- Funders/Community Partners
- Governmental Agencies
- Media/Social Media
- Vendors/Suppliers

Future Leaders

2/5 have rejected a job that didn't align with their values

5+ Years – Amount of time Gen Zs and Millennials are likely to stay with an employer that is focused on environmental impact and creating a diverse and inclusive culture

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POLLING QUESTION #10

Does your organization have an ESG strategy in place?

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Answers to Your Board's ESG Questions

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DEIB

“Do we have a living wage policy to promote the economic inclusion of all our employees, irrespective of age, sex, disability, race, ethnicity, origin, religion or other status?”

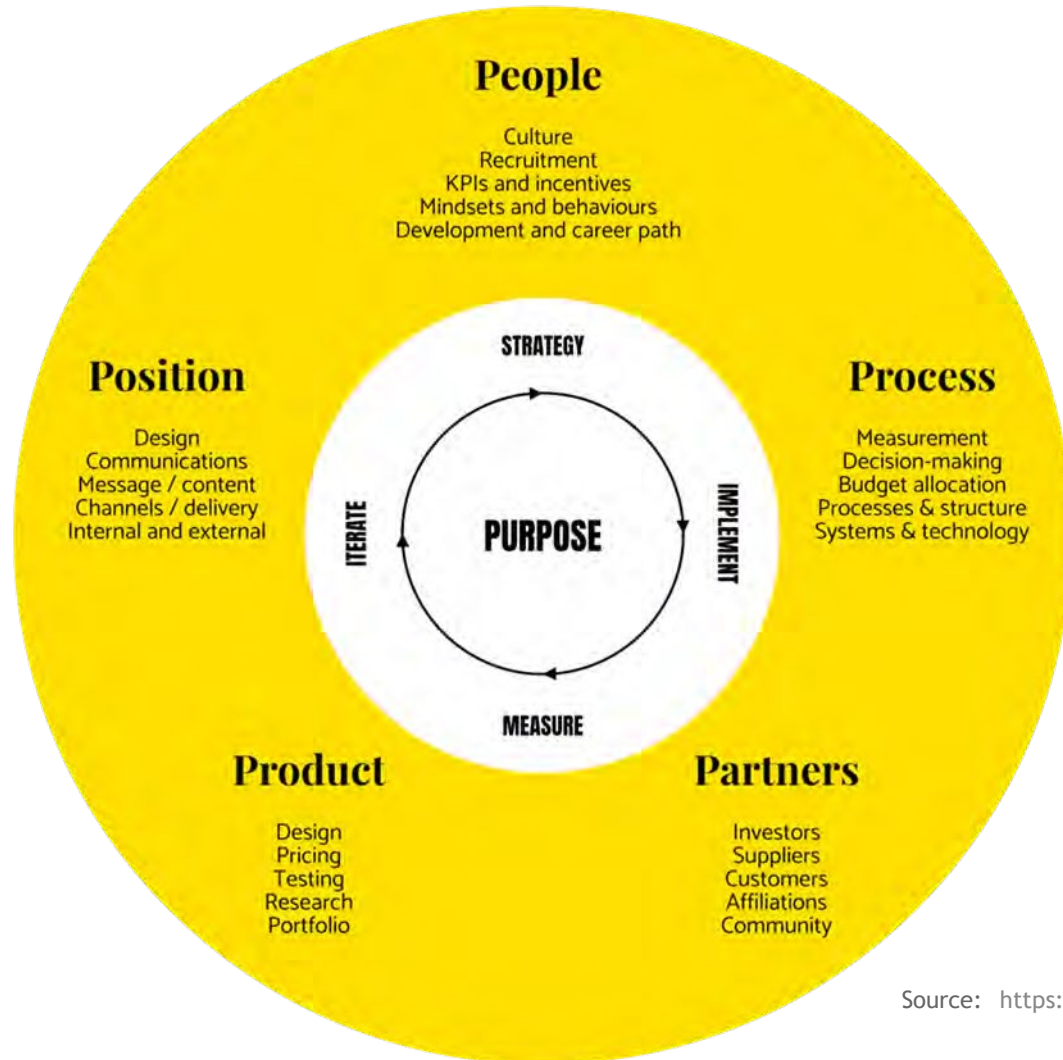
SEARCH TR/01 03

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Continuous Improvement



Source: <https://leadersforgood.org/diversity-inclusion/>

Follow the Money

“What is our endowment investment policy regarding ESG funds?”

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ESG Investing

The Nonprofit & Foundation Impact

“It’s a way to do more good with more money, expanding an organization’s positive effects from just the proceeds of a portfolio to the entire portfolio.”

Source: Nonprofit Information

Specifics

- Non-Market Funds
- Direct Indexing
- Activist Investing

Source: Bloomberg

ESG Investing

“Are we attracting and retaining eco-conscious donors and government grants by reducing and reporting our environmental impact?”

SEARCH TR / 01 03

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Next Gen Philanthropists



ESG Investing

“How are we maximizing corporate and civic sponsorships and utilizing their power to share our organization’s impact on the community?”

SEARCH TR / 01 03

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Partnerships



Corporations & Nonprofits Making a Difference Together

- Unilever Goal, UK Government, UN Refugee Agency (UNHCR) &and the International Rescue Committee (IRC)
- Ecolab – The Nature Conservancy = Water Coalition
- Pact & Coca-Cola

POLLING QUESTION #11

I believe developing and implementing an ESG strategy for my organization will enable us to better recruit and retain talent.

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Future Value of ESG

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ESG for

Future- Focused Leaders

- Focus your limited attention on the issues and strategies where you can have the largest impact, helping you create greater change on the ESG issues that you and your stakeholders are passionate about.
- Help others see a clear path forward on issues where there may not have been consensus before by crafting a vision of long-term success that people can buy into.
- Become more valuable to your organization and more marketable for future positions.



Keynote Speaker: Trista Harris

Break the Silos

“One of the many things the pandemic has brought into sharp focus is just how interconnected these issues are. Now is the time for our nonprofit community to embrace ESG as a framework for advancing their missions to build a better world.”

— Dr. Emily Young, Executive Director of University of San Diego's Nonprofit Institute

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ESG Reporting



Higher Education Leading the Way

- Association for the Advancement of Sustainability in Higher Education
- Movement driven by students and professors
- 17 Impact Areas – Air & Climate, Curriculum, Diversity & Affordability...

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We Need You!

Winning Qualities

- ESG Experience
- Adaptive & Critical Thinking
- Multidisciplinary Systems Perspective
- Passion

POLLING QUESTION #12

A strong ESG strategy:

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To be the most innovative and
entrepreneurial firm that makes a
positive impact on the lives of our clients,
our people, and our communities.

This is why we EXIST



Be the **Change** you wish to see in the world.





OPPORTUNITIES!

Email Subject Line: Community Service

To: ArmaninoFoundation@armanino.com



armanino foundation

BREAK

**The next session will begin
at 1:00 p.m. (CT)**

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Presenters



Stacie Kowalczyk
Partner
Armanino Advisory LLC



Alex Gyorffy
Senior Manager
Armanino Advisory LLC



Dionne Broadus, J.D.
American Heart Association
National Vice President, Social
Impact



Claire Ugo-Ike
American Heart Association
Lead Evaluation Analyst

Your Destiny: Social Impact and Data Analytics

Today We'll Discuss:

- Social Impact Analysis
 - What is it? Why does it matter?
 - Market trends
- The American Heart Association Story
 - AHA Mission
 - Social Impact Funds
 - Measuring impact – Investee ROI and Social Determinants of Health
- Q&A

POLLING QUESTION #13

How important do you feel it is for nonprofit organizations to report on their social impact?

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Social Impact Analysis

What is it?

- **Social impact analysis** is the process of measuring, analyzing, and monitoring the impact of planned interventions (policies, programs, projects) and value creation for your community
- Focused on quantifying both economic and social impact, and who is experiencing those benefits
- **Social Return on Investment (SROI)** estimates the monetary value of social, environmental, and economic outcomes as a ratio to costs or investments (inputs)

Benefits

- Support data-driven decision making to optimize operations and achieve more for your cause
- Effectively prove and communicate the impact of your organization's work to stakeholders

Social Impact Analysis

Market Trends and the Role of Technology

More nonprofits are providing real-time data and public reporting, as donors demand transparency and metrics on the impact of their donations

30%

Demonstrating impact measurement to existing and potential donors is a major issue

72%

Say donors expect remote access to KPIs

72%

Have plans to show real-time KPIs on their website

31%

Provide a dashboard to show impact measurements of donations in action
(86% say it is impactful)

POLLING QUESTION #14

Does your organization currently report on social impact for specific programs or funding streams?

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AHA Social Impact Funds

Advancing the AHA Mission

- **Compliments** the lifesaving work AHA has been doing for nearly 100 years
- Social Impact Funds advance the AHA's **2024 Health Equity Impact Goal**
- Key Strategy of Commitment #2 of AHA's 10 Bold Commitments to achieve Health Equity: **Raising and Investing \$100M in community-led solutions to address health inequity and structural racism**



AHA 2024 Impact Goal:

Every person deserves the opportunity for a full, healthy life. As champions for health equity, by 2024, the American Heart Association will **advance cardiovascular health for all, including identifying and removing barriers to health care access and quality.**

Key Goals – What Do the Social Impact Funds Do

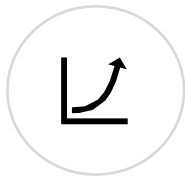
Investing to address the needs of communities from within the communities themselves by:



Providing Access to Capital for For-Profit and Non-Profit Small and Medium-Sized Enterprises (investees) that address adverse Social Determinants of Health with the goal of generating long-term positive health outcomes.



Combating Structural Inequities through an inclusive and innovative approach to investing in social entrepreneurs and organizations that are reflective of their communities and have a vested interest in solving the challenges there. This often includes investing in diverse organizations that have been systematically bypassed by venture capital.



Accelerating innovation, scale, and the sharing of best practices for the Social Impact Funds' portfolio of investees.



Dynamically studying and addressing needs of our portfolio investees and in our markets to ensure we are working on the most pressing challenges.

Impact Areas: What we Fund

Investing in solutions focused on three main Social Determinants of Health



**Access to Health &
Healthcare**



Food Security



**Economic Resiliency/
Poverty Reduction**

Investment Portfolio

Cumulative Social Impact Funding

98

Social
Enterprises
Funded

\$32M+

Raised from
donors

\$128M+

In new revenue and funding to social
enterprises from AHA seed
investment

4X social impact return

Key Portfolio Points

- **92% of current portfolio** led by **people of color or women**
- **100% of portfolio** operates within under-resourced communities
- **For 75% of current portfolio**, AHA funding is the first or largest commitment from an institutional investor, catalyzing new revenue and investments
- **More than 80%** of donor funds go directly into the community to the social enterprises
- Most SMEs are **early-stage**. Approximately **35%** are for-profits.

Current Social Impact Fund Markets

Led by donor interest



As of September 2022

POLLING QUESTION #15

True or False: Boards and Governance Committees must set the tone at the top for strategic initiatives?

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Measuring Social Impact

Guiding Principles

- Understanding **how much change** occurred as a result of our investments and investees' activities
- Not just about measurement, but about **integrating stakeholder voice** to understand community outcome
- Emphasis on **sustainability** and long-term outputs and impact beyond initial grant/investment period

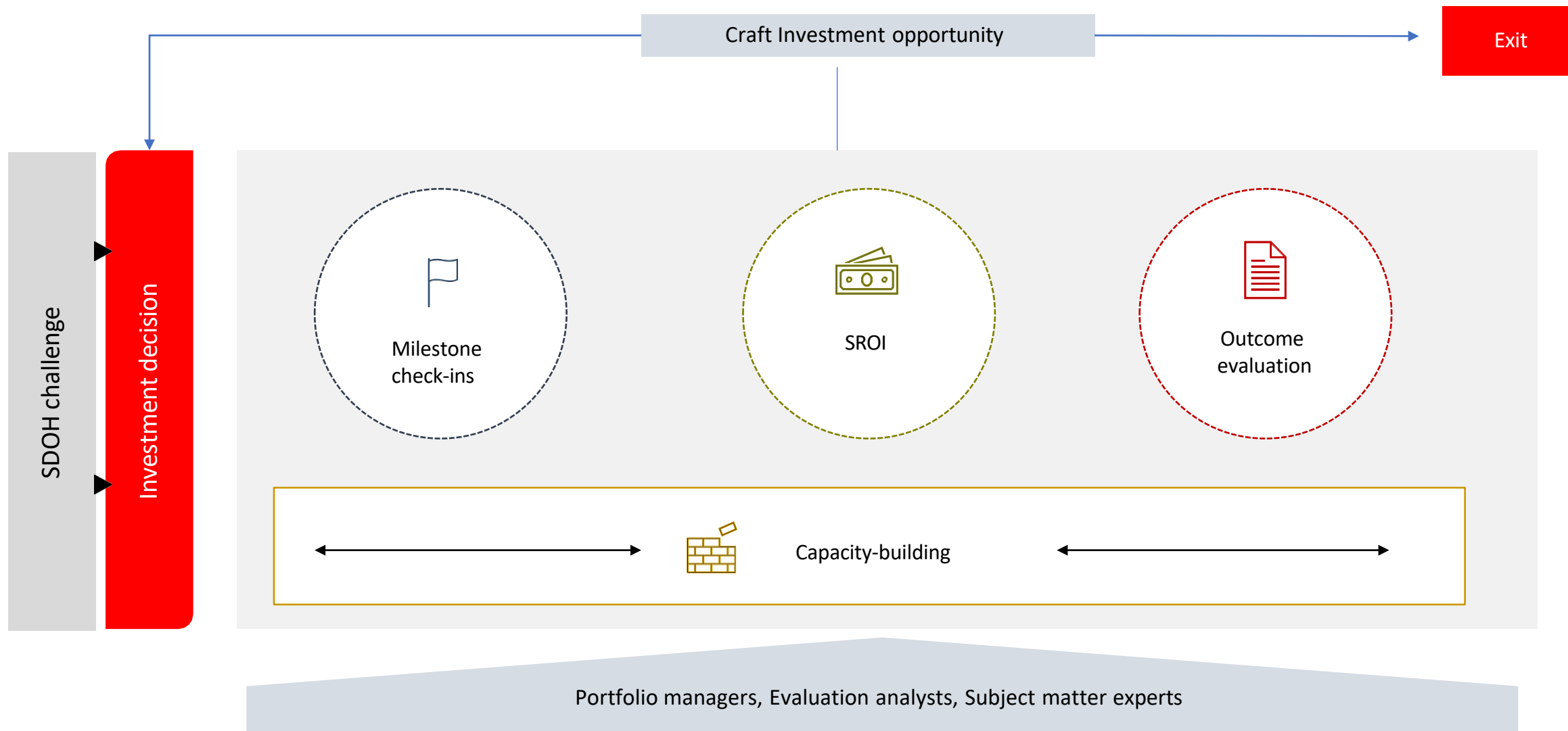
Impact First

Community-centered
solutions

Reliance on evidence and
measurement

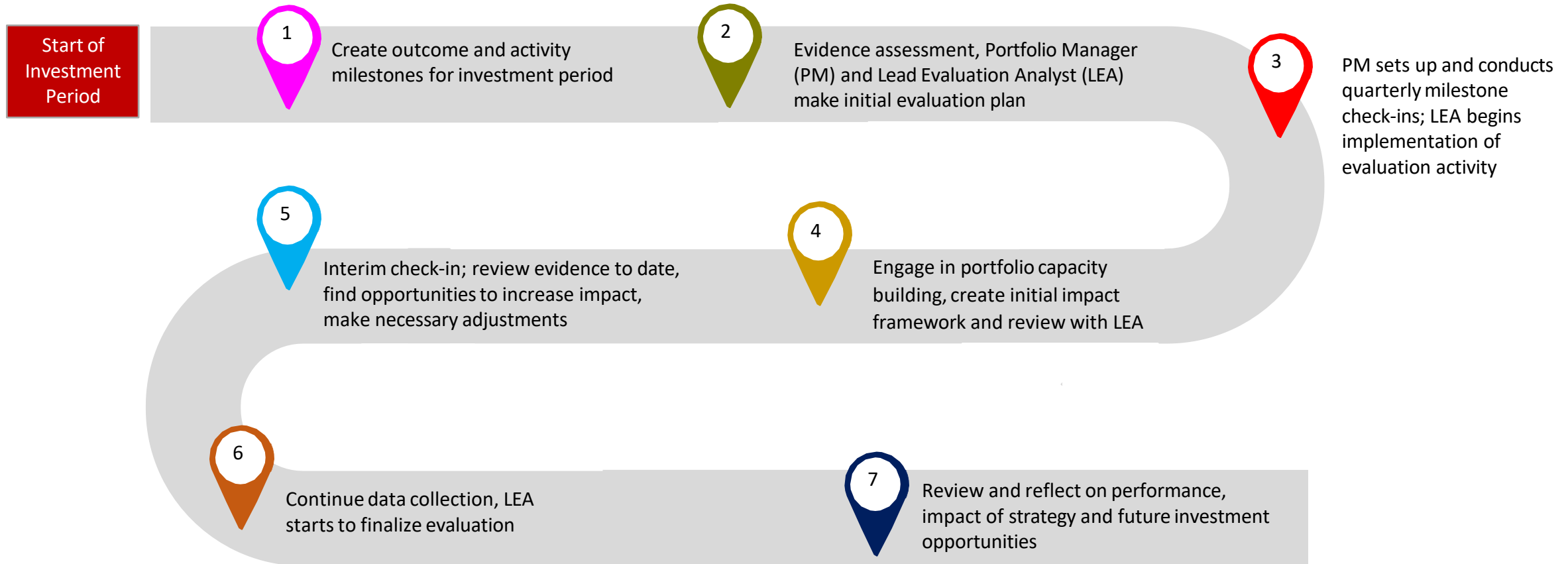
Highest social return per
investment dollar

Social Impact Funds Evaluation Framework

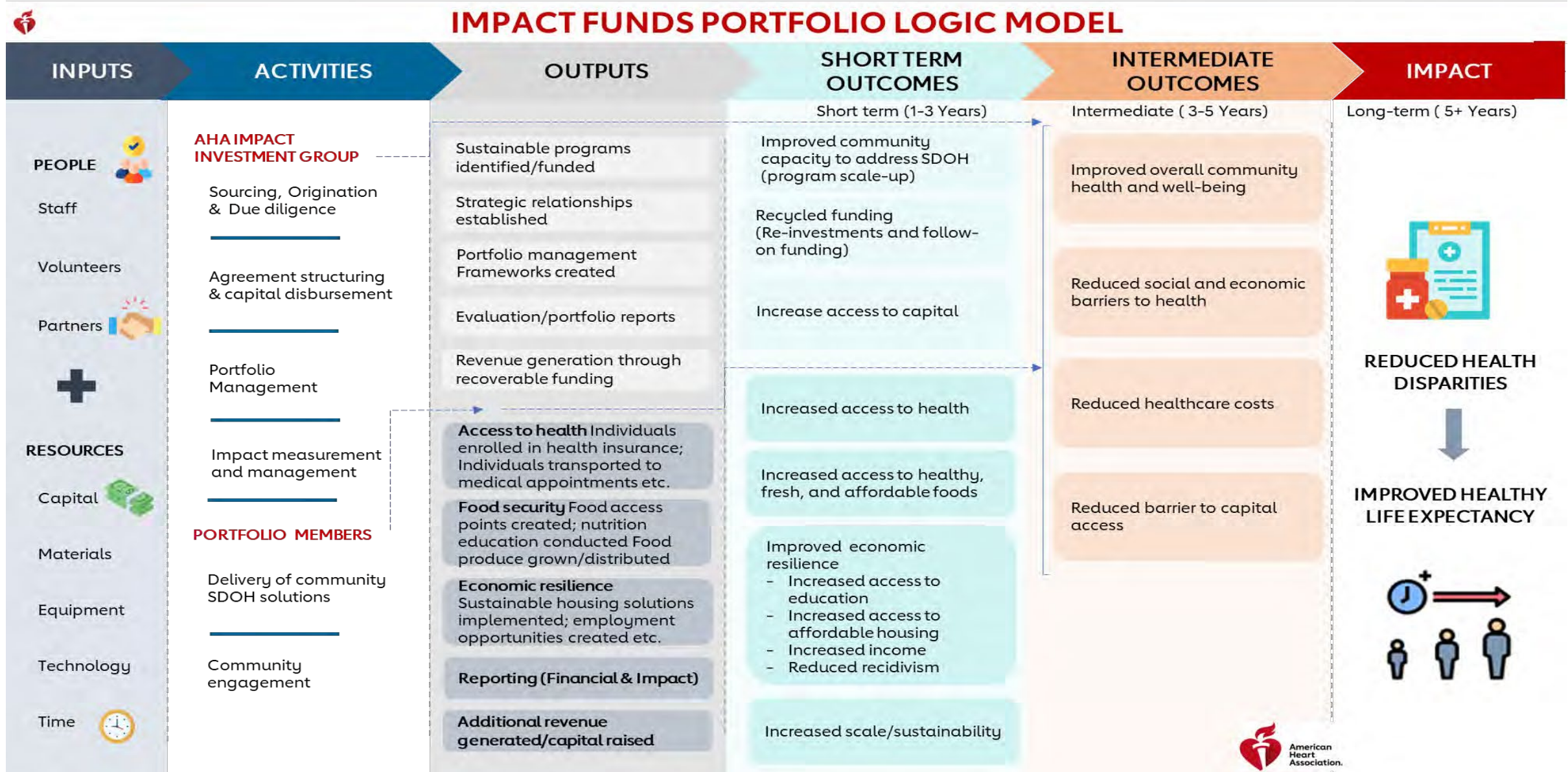


Performance Managing Investees to Impact

Roadmap



Impact Measurement and Management



Measuring Investee Performance

Technology Enablement:

- Centralized data
- Personalized views for investees and your communities
- Project views
- Surveys to collect data and engage stakeholders
- Reporting



Measuring Social Determinants of Health Impact in Our Communities

Our investments have **improved the quality of life** for **1.6 million individuals** across the nation, across our social determinants of health areas.

Health and Healthcare

HEALTHCARE
SERVICES



10,523
people have
access to
healthcare
services

MENTAL HEALTH



13,077
people have
access to mental
health services

HEALTH
TECH/INNOVATIVE
SOLUTIONS



312,417
people have
access to
healthcare
services through
innovative
approaches to
healthcare

Food Security

HEALTHY FOOD
ACCESS



82%
Individuals within
food insecure
communities
reporting
increased access
to healthy
and affordable food

HEALTHY FOOD
AVAILABILITY



1,479,544
pounds of fresh
produce grown for
areas with limited
access to affordable
and nutritious food

SALE OF FRESH
HEALTHY FOOD



\$9,140,596
worth of fresh
produce and
healthy meals were
purchased within
food insecure
communities

Economic Resiliency and Poverty Reduction

HOUSING



1,625
individuals now
living in stable
housing

RECIDIVISM



6%
recidivism rate
achieved across
portfolio programs
(compared to the
national rate of
45%)

EDUCATION



2,694
students have
improved
access to
education

POLLING QUESTION #16

Is it achievable to implement a road map and measurable metrics to measure social impact performance at your organization?

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CLOSING

Jeff Owens
Partner
Armanino Advisory LLC
Armanino LLP

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