

# How Impact Investors Can Use Policy Advocacy and Engagement to Advance the Common Good

## Speaker Biographies

**Annie Donovan** is Chief Operating Officer of LISC. Immediately prior, she was a Senior Fellow at the Beek Center for Social Impact and Innovation at Georgetown University and a Senior Fellow at the Center for Community Investment at the Lincoln Institute of Land Policy. Annie's distinguished career in community development and impact investing includes serving as Director of the U.S. Department of the Treasury's Community Development Financial Institutions Fund (CDFI Fund). Prior positions include CEO of CoMetrics, Inc; Senior Policy Advisor to the White House from 2012-2013, working collaboratively with the Office of Social Innovation and the Council on Environmental Quality; and Chief Operating Officer of Capital Impact Partners, a certified CDFI. Annie has also been a thought leader and a board member of many of the highest performing organizations in the community development sector. She has published papers and articles for the National Academy for Public Administration, the Federal Reserve Bank of San Francisco, the Federal Reserve Bank of Boston, Forbes, the Skoll World Forum on Social Entrepreneurship, and the Milken Review and was a contributor to the upcoming Surgeon General Report on Community Health and Economic Prosperity. She has an undergraduate degree in Economics and an MBA in Finance.

**Matt Edridge** is a policy program manager in the Urban Institute's Research to Action Lab. His research, policy, and technical assistance work center on how innovative public, private, and philanthropic investments can yield improved social and environmental impacts. His work has covered a variety of approaches and models including pay for success and impact bonds, blended finance, performance-based contracting, place-based impact investing, and innovations in local resource mobilization. The principles of equity, impact, and evidence guide his work and interest in this space. Some of his recent work at Urban has included reviewing enabling environments for public-private partnerships, identifying barriers to policy implementation in Africa, researching the role of regional business partnerships in supporting inclusive growth, and evaluating of a federal grant program for African American history and culture. Before joining Urban, Edridge spent two years consulting on financial regulations and three years at the World Bank working on corporate reform and helping manage the Bank's Central Asia portfolio. He holds a BA from Virginia Tech and an MSc from the London School of Economics and currently resides in New York City.

**Lisa Green Hall** is Impact Chairperson at Apollo Global Management, one of the world's largest alternative investment manager, where she advises the firm on impact management. She is recognized as a global leader in impact investing and has held a variety of significant roles across asset management, academia, and policy. Previously, she worked as a Fellow in Residence and Professor of Practice at the Beek Center for Social Impact and Innovation at Georgetown University where she led an initiative focused on research and thought leadership related to the inclusive economy. Ms. Hall previously served as a Managing Director at Anthos Fund & Asset Management ("AFAM"), where she launched and oversaw the firm's impact investing portfolio. Prior to AFAM, she was the President and Chief Executive Officer of the Calvert Impact Capital (formerly Calvert Foundation) where she led the strategic direction, fundraising, and management of the non-profit pioneer in impact investing, working to alleviate poverty through impact investing in the United States and abroad. Ms. Hall also covered economic and community development policy issues for the White House as a Senior Policy Advisor for the National Economic Council in the Clinton Administration. Ms. Hall received a Master of Business Administration from Harvard Business School and a Bachelor of Science in Economics from the University of Pennsylvania's Wharton School of Business. Ms. Hall has diverse civic

leadership and non-profit board experiences. Ms. Hall currently serves on the Board of City First Bank, where she is the Chair of the business and community development committee and is focused on providing financial services in low- and moderate-income communities. She also serves on the Board of Habitat for Humanity International. Ms. Hall was previously a Presidential Appointment to the Advisory Board to the Community Development Financial Institution Fund. Ms. Hall has been on the Company's Board since 2020 and her present term expires in 2021.

**Amy Hartzler**, founder of Do Good Better, is a communications strategist and systems change agent who specializes in the messy issues we don't like to talk about: from nuclear weapons and disability rights to climate change, patriarchy, death, and money. Most recently she has been focused on the future of work, consumerism, healthcare, and faith-based philanthropy. Amy tracks meta-narratives that inform conditions for communications, and specializes in strategic and tactical storytelling including grassroots/"grasstops" campaign ideation to videos, newsletters, annual reports, social content and other unique executions to advance goals. Her work has focused on local and regional economy building, entrepreneurship, impact investing and philanthropy, with a commitment to economic and social justice. Previously she led the D.C. office of Free Range Studios, a B Corps and one of the first creative firms focused exclusively on the social change sector. She was instrumental in developing Free Range's storytelling methodology captured in the book, *Winning the Story Wars*.

**Brett Theodos** is a senior fellow and director of the Community Economic Development Hub at the Urban Institute. His work focuses on economic and community development, neighborhood change, affordable homeownership, consumer finance, and program evaluation and learning. His research includes evaluations of the Economic Development Administration, New Markets Tax Credit, Small Business Administration loan and investment programs, Opportunity Zones, and the US Department of Housing and Urban Development's Choice Neighborhoods, Community Development Block Grant, and Section 108 programs. He is studying how capital flows (or fails to flow) into communities, including the role of mission finance actors like community development financial institutions. He leads projects researching how entrepreneurs can access capital. Theodos has conducted studies of neighborhood change and geographic mobility. He is evaluating several place-based initiatives. He's led studies of affordable homeownership supports, including shared equity models like community land trusts. In the financial capability space, he's led studies of financial coaching, financial curriculum, and rules of thumb for decisionmaking. He's explored the geography of debt. Theodos is working to grow nonprofit capacity in performance measurement. He directs Measure4Change, which provides technical assistance and facilitates a community of practice for nonprofits and has led randomized controlled trial evaluations of youth workforce and education preparedness programs. Theodos serves on the Board of the Center for Community Progress, the Douglass Community Land Trust, and the Housing Authority of Prince George's County. Theodos received his BA from Northwestern University, MPP from Georgetown University, and PhD in public policy from George Washington University.

**Laura Tomasko** is a policy program manager for the Center on Nonprofits and Philanthropy at the Urban Institute. She oversees work on charitable giving and impact investing and ensures Urban's research is widely used by practitioners, advocates, and policymakers. Before joining Urban, Laura was an associate program officer at the Bill & Melinda Gates Foundation, where she managed a portfolio of grants focused on building policy and data capacity for the philanthropic sector. During the Obama administration, she served as a senior policy advisor for social innovation in the White House Domestic Policy Council and deputy associate director for public engagement at the Council on Environmental Quality. Laura previously held positions at national philanthropy associations, the Council on Foundations and Grantmakers for Effective Organizations, as well as community-based organizations, the Central New York Community Foundation and the Children's Aid Society.