

Summary of Finance Forum Exit Survey

Responses: 23 total (collected through March 30, 2020) out of 60 Forum participants

Overall, respondents had very positive views of the Forum. Attendees enjoyed the morning presentations on conservation finance and appreciated how it allowed everyone to start on the same page with a complex topic. However, attendees felt that it wasn't particularly clear how the theme of oysters connected back to their finance topics of interest. A few respondents suggested either broadening the theme to two outcomes or focusing in on a very specific oyster finance project. Oysters are a concrete marketable good, and some of the other groups in the room could have benefited from having a more abstract concept, such as stewardship or wetlands, as an additional example. On the other hand, many participants found the oysters panel and ignite talks to be informative and appreciated observing the conversation between the panelists.

In general, respondents enjoyed the breakout sessions and found them to be about the right length. Respondents benefited from being able to connect with their finance coaches during the breakout sessions. Some viewed the diversity of financial background as a hindrance to discussing specific project proposals; however, those with less financial background found the group discussions highly informative. Several respondents indicated that the breakout sessions introduced them to new ways of thinking, and they highlighted specific positive conversations with their coaches. Respondents also indicated that there could have been more structure and guidance to the breakouts. It may have been helpful to have a clear goal for the report out at the end of the meeting to help drive the table discussions. While some found the guiding framework helpful, other tables did not use the framework. This may indicate more guidance and pre-work was needed for these discussions.

Many of the respondents expressed enthusiasm for the Forum and indicated interest in continuing their conversations with the coaches afterwards. When asked how they would apply topics from the Forum in their future work, respondents indicated that it helped provide them with a basic understanding of finance topics and that they realize there is still lots to learn. One respondent mentioned that their workgroup now plans to incorporate finance projects into their logic and action plan. Another discussed interest in enabling conditions, which was a concept directly introduced in the Finance 301 presentation. There is interest in learning more about how insurance markets could be beneficiaries to conservation projects, as well as potential for bundling projects between outcomes.

The individual survey responses provide more detail. The following numeric averages were calculated:

- How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent? **8**
- How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations? **7**
- After attending, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with 1 being not familiar and 10 being very familiar? **6**
- After attending, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready? **6**