



SOCIAL IMPACT INVESTING

Executive Education Program



This cutting-edge three day course enables nonprofit, foundation and social enterprise leaders to leverage the power of social enterprise and social impact investing together to increase impact, improve stability, and grow the sustainability of their organizations.

October 10th - 12th, 2017

9:00am – 5:00pm | [Apply Now!](#)

Course Tuition

~~\$2,100~~ \$500 (over 75% off!)

Hosted by:

Grand Rapids Community Foundation
185 Oakes St. SW
Grand Rapids, MI 49503

What You Will Learn:

- What is a social enterprise, what can it do for your organization and what structures should be considered? (emphasis on legal, tax and funding options)
- How can you use impact investing to expand your mission and increase your total access to funding?
- What are foundations looking for in a social enterprise compared to a traditional grant funded program?
- What is the impact investing ecosystem and what industry trends are creating billion dollar funding opportunities?
- How can you access the extensive network, knowledge, and other resources of foundations through true partnerships?

Course Benefits:

- Understand the legal, tax, and financial issues your organization will face – before you face them – potentially saving thousands of dollars in professional fees and rework
- Cultivate a network of social innovators and receive detailed financial models, sample legal agreements and five free hours of consulting time to help you get started
- Expand your toolset beyond that of a typical nonprofit leader and stand out among your peers when you talk to funders
- Bring sustainability to your organization and reduce your dependence on grants, donations, and reimbursements



Photo courtesy of M-Buck Studio

“ Imagine being the only interview candidate that knows what the hiring manager is looking for... Spending three days with a funder was hugely beneficial, as was the opportunity to build relationships and network. ”

Ernest Perry
HandsOn Central Ohio

“ Everything you need to know about social entrepreneurship but were afraid to ask! A dynamic learning opportunity and the most engaging training I have ever been to. ”

Kathy Streblo
Foundation for the Challenged

“ The class made it clear that anyone who wants to go down this path can succeed. The course has an enjoyable format that allows you to learn from dozens of real life examples as well as from other participants. ”

Kimberly Reynolds
Netcare Access



CONTACT:

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Agenda: Day 1

The course begins at the macro level with a discussion of how the philanthropy industry is and has evolved to its current makeup before looking at the social impact investing ecosystem more specifically. Key terms are defined and students evaluate their own organizations for risk in the eyes of an investor. This discussion of risk and return translates into a lesson about the various types of funding that are available. Students will begin to understand where their organization is situated in the greater ecosystem, but more importantly students will be able to distinguish between which type and source of funding is appropriate for a given situation, and which others are not.

Agenda: Day 2

Day 2 of the course focuses on the legal organization of a social enterprise activity. This organization can simply take the form of a single entity or it can be part of a parent-subsiary hybrid structure. Throughout the day we consider legal liability and tax issues related to each of the legal entity options, enabling students to purposefully choose the most effective legal form for their social ventures. This includes a group activity where students practice applying their knowledge to various scenarios. The afternoon covers partnerships with other organizations in the context of Corporate Social Responsibility and Creating Shared Value, contract hybrids, and joint ventures.

Agenda: Day 3

The third and final day of the course is focused on becoming investment ready and thinking even further outside the box. The day begins with a lecture on licensing, which allows great ideas to take flight and generate income using the help of a partner without giving up control. Next is an in-depth case study that puts the Mission-Money Matrix to use. This is one of the most beneficial activities in the program and focuses on preparing your organization for success prior to taking on outside investment. The day concludes with everyone's favorite activity, the SharkTank™, in which participants play the roles of impact investors and nonprofits who are pitching for social impact investment. This is a one of a kind experience that prepares participants to make their own investment pitches in the future.

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Visit our website for more info:
www.trwellsfoundation.org



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The Wells
FOUNDATION

Lecture Topics

- Industry trends
- Defining Social Entrepreneurship and Social Impact Investing
- Impact Investing Ecosystem
- Mission Related Investments
- Program Related Investments
- Risk & Return
- Charitable arrangements
- Debt financing
- Quasi-equity debt financing
- Equity financing
- Funder Motivations & Expectations
- Nonprofit
- C-Corporation
- Limited Liability Corporation (LLC)
- Benefit Corporation
- Low-Profit Limited Liability Corporation (L3C)
- Income Tax Issues
- Threats to parents nonprofit's tax status
- Partnerships
- Creating Shared Value vs. Corporate Social Responsibility
- Contract hybrids
- Joint ventures
- Licensing & Royalties
- Mission-Money Matrix Activity (in-depth)
- Getting Organizational Buy-In
- SharkTank™ Simulation

Work Book Contents

- Mission-Money Matrix (to define social entrepreneurship)
- Mission vs. Profit Activity
- Top 10 Philanthropists (Entrepreneurs) of the Decade
- Risk Assessment Activity
- Reflection Point 1
- Adjusting the Size of Your Loan Payments
- Loan Amortization Schedule Practice Activity
- Equity as a Program Related Investment
- "Can it Qualify as a PRI?" Activity
- Summary Comparison of Different Types of Funding
- Reflection Point 2
- The 5 C's of Credit
- Factors to Consider when Making a Loan
- Motivations & Expectations of Capital Sources
- Sphere of Influence Activity
- Funding Types, Sources and Eligibility
- Using IRS Tests Together
- Funding Eligibility by Legal Form
- Common Exceptions to UBIT
- Overview of Legal Structures
- Legal Structures Group Project
- 5 Yr. Debt vs. Equity Model Exercise
- Reflection Point 3
- Reflection Point 4
- Nonprofit Earned Income Strategies
- Mission-Money Matrix Activity
- Reflection Point 5
- SharkTank™ Activity
- Reflection Point 6: SharkTank™
- Raise4Me Sample Licensing Agreement
- What Should Your Feasibility Study Include?
- What Should Your Business Plan Include?
- Investment Application Checklist
- Sample Community Foundation Investment Process
- Making a Business Plan
- Loan Agreements Analysis
- Sample Loan Agreement

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