Impact Investing Institute Request for Partners
January 2019

Impact Finance Center (IFC) is launching the Impact Investing Institute (Institute) in 2019 and is soliciting Impact Investing Institute Partners. The Institute has been designed to provide high-quality, affordable education to organizations - such as community foundations, universities, and philanthropic supporting organizations - who want to attract and retain membership by providing high-quality affordable impact investing education content. Each organization will be able to determine the brand of their own Institute. For example, BALLE could create the BALLE Impact Investing Institute and include logos from providers like IFC or another organization or just keep it as BALLE. IFC seeks up to 10 organizations that want to test pilot - at no cost with profit sharing - the Impact Investing Institute from 2019-2022.

Since the start of CO Impact Days in 2016, we have created over 100 impact investing courses and used these courses to 1) increase membership for backbone organizations providing recurring revenue, 2) provide new sources of investment capital for social ventures supported by backbone organizations, 3) and deliver curriculum customized for both investors and social ventures.

We now want to scale this solution, creating win-win-win solutions for all of those organization involved. Participation is free for the first 8-12 partners who commit in exchange for course reviews and includes a 10-20% profit share split by the partners.

The Ask – What is the Commitment?
1. Signatory: Your name would be listed as a partner on the pitch deck.
2. Course Review: Each organization will receive links for free access to courses for its members and staff throughout the next three years. The cost is free to your organization to participate in exchange for your staff and member providing course reviews. Course lengths will vary in size.
3. CO Impact Days Attendance: CO Impact Days is our 3-day Executive Education course, March 12-14, preceded by the National Opportunity Zone Summit March 11. As a partner, we will invite you to promote, profit share, and co-create content.

The Benefit – Why Partner?
1. Produce more impact investors
2. Deliver impact investing curriculum to your community
3. Recurring revenue: 10-20% of the profit from the Institute will be divided among these core partners for the first five years.

Can My Organization Create Content?
1. Yes, any organization can propose content and work with our curriculum designers and professional team.
<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accelerator #1 Techstars Foundation</td>
<td>Jan 10 - Invited to Participate</td>
</tr>
<tr>
<td>Accelerator #2 DEVLABS</td>
<td>Agreed 1/8</td>
</tr>
<tr>
<td>University #1 The New School</td>
<td>Jan 9 - Invited to Participate</td>
</tr>
<tr>
<td>University #2 Colorado School of Mines</td>
<td>Jan 8 - Invited to Participate</td>
</tr>
<tr>
<td>Philanthropic Supporting Organization - Place-Based #1 Colorado Association of Funders</td>
<td>Jan 8 - Invited to Participate</td>
</tr>
<tr>
<td>Philanthropic Supporting Organization - Place-Based #2 Michigan Council of Foundations</td>
<td>Jan 8 - Invited to Participate</td>
</tr>
<tr>
<td>Philanthropic Supporting Organization Affinity #1 Justice Funders Network</td>
<td>Jan 8 - Invited to Participate</td>
</tr>
<tr>
<td>Philanthropic Supporting Organization Affinity #2 Sustainable Agriculture &amp; Food Systems Funders</td>
<td></td>
</tr>
<tr>
<td>Backbone Organization BALLE</td>
<td>Jan 8 - Invited to Participate</td>
</tr>
<tr>
<td>Backbone Organization Social Venture Circle</td>
<td>Jan 10 - Invited to Participate</td>
</tr>
<tr>
<td>Community Foundation #1 New York Community Trust</td>
<td></td>
</tr>
<tr>
<td>Community Foundation #2 The East Bay Community Foundation</td>
<td></td>
</tr>
<tr>
<td>CDFI Organization Opportunity Network</td>
<td></td>
</tr>
<tr>
<td>CDFI Organization AEO</td>
<td>Jan 10 - Invited to Participate</td>
</tr>
<tr>
<td>Placed-based Ecosystems ImpactPHL</td>
<td>Agreed</td>
</tr>
<tr>
<td>Placed-based Ecosystems Twin Cities</td>
<td>Jan 10 - Invited to Participate</td>
</tr>
<tr>
<td>Other ideas?</td>
<td></td>
</tr>
</tbody>
</table>
About Impact Finance Center
Just as accelerators such as TechStars, LearnLaunch, or 500 Startups identify, educate, and invest in entrepreneurs, Impact Finance Center (IFC) identifies, educates, and activates early adopter individuals or organizations who want to become impact investors. IFC was founded in 2012 and is a nonprofit multi-university academic center. IFC’s flagship initiative, CO Impact Days and Impact Investing Institute was created in 2016, and is the first-ever statewide marketplace with a 3-year goal to catalyze $100 million of investments into social ventures in Colorado. We have far surpassed that goal ahead of schedule, with individuals and organizations having already made 258 direct impact investments exceeding $201M. Additionally, IFC has delivered more than 170 presentations and 100+ courses to over 5,000 participants. Our leadership team has also evaluated and upgraded the governance of several asset owners and assisted private foundations and individuals in finding new investment advisors.

How do we create the National Impact Investing Marketplace? We do it by scaling CO Impact Days and Impact Investing Institute to a regional Rocky Mountain Impact Days and Impact Investing Institute while replicating it throughout the U.S to develop six regional marketplaces.

We have all the pieces of the puzzle on the table. Now we need to commercialize and scale the solution.

Our goal is to create the National Impact Investing Marketplace by 2030. Our strategy is simple.

1. We need to grow more impact investors faster and more efficiently.
2. We need to create a self-sustaining financial model for Impact Days and Impact Investing Institute.

The three tactics we will use to achieve that will be:

1. Develop a social enterprise model for Impact Finance Center (IFC), CO Impact Days, and Impact Investing Institute that will result in a financially self-sustaining social enterprise.
2. Launch pilot Impact Investing Giving Circles, a critical part of Impact Investing Institute that will identify, educate, and activate more impact investors at scale.
3. Develop a Main Street 2.0 Alliance that engages both accredited and non-accredited investors, and that can be scaled and replicated to different communities of place, interest, or identity.

Testimonials
I’ve been in the field of aligning money with values and business, since the early 80’s. I wrote a book about it and do many interviews and talks on the topic. Watching Stephanie map an overview of the diverse strategies and creative possibilities for moving money towards positive impact, was by far the best, most action-packed, cogent, eye-opening presentation and overview of the field that I have ever experienced. Talk to Stephanie. Book her to speak to your group. Encourage her to write a book, do video training, or clone herself. You will be doing a great service for the world. Her presentation of the comprehensive strategies available to influence and leverage capital for the betterment of communities and issues will give rich dividends. Put on your seatbelt!

Joel Solomon, Chair-Renewal Funds, Author-“The Clean Money Revolution”
"It's super rare to get world-class portfolio advice from someone who doesn't have their hand in your pocket. It's rarer to get a whole new framework for thinking about donations and philanthropic work. Rarest of all is a combination of clear next steps and challenge to take action. Stephanie Gripne and John O'Halloran of the Impact Finance Center deliver a trifecta." **Jon Kauffman**

You can read how it fits into our national vision that was published in the Foundation Review, “Laying the Groundwork of the National Impact Investing Marketplace,” which builds off of the Forbes article.

**Background Information** (Please contact stephanie@impactfinancecenter.org for access to these documents)

- main street 2.0 – reinvesting and community banking and community investing
  - [main street 2.0 draft blog](#)
  - [impact investing institute pitch deck](#)
  - [impact investing institute pro forma](#)
  - [impact investing institute grant and investor prospects](#)
  - [impact investing institute potential advisors](#)

- background reading
  - [laying the groundwork of the national impact investing marketplace](#)
  - [forbes magazine article](#)

- corporate impact investing
  - [wells fargo corporate socially responsible program impact investing proposal](#)
  - [comcast commons on champa 2.0 proposal](#)

- courses
  - [online: community foundations and impact investing][2] password: CoimpactdaysMar122019
  - [In person: 2-day corporate impact investing course march 14 pm-16, denver, co](#)

- immigrant & people of color and impact investing giving circle
  - [immigrants & people of color and impact investing giving circle glossy](#)
  - [example grant impact investing giving circle – environment and health](#)