

Working Group: Colorado Impact Day Demand-side

Working Group Leader:

Working Group Focus: For profit enterprises, non-profit social ventures, projects, public projects. All entities must have a positive social and/or environmental impact.

Working Group Goal: This working group will focus on identifying the Colorado social venture landscape (for profit and non-profit) and assessing the best way to bring them into Impact Day.

Working Group Year 1 Outcomes (completed by Colorado Impact Day):

1. Demand-side Directory: Create a list of Stakeholders, Funding Needs, etc. that will eventually feed into the CII / CID Directory.
2. Stakeholder Engagement Plan: What are the most effective Marketing and Outreach strategies? How do those integrate into the larger CII/CID Marketing and Outreach plans?
3. Education & Networking Assessment and Gap Analysis: Where do we need additional events to help fill the impact investing education gap? What events already exist? What could be created?
4. Impact Initiative Support Strategy: Who can help with promotion, fundraising, sponsorship and at what level?

→ Contact list

→ pipeline partners - program officers, etc

→ technical assistance

Donor-advised funds, sponsors - interested, how do we get to them

Jan. 2015 Working Group Meeting Outcomes:

(The highlighted items are homework assignments to be completed by 01-09-2015)

1. Comprehensive list of Stakeholders and their details (Stakeholders Tab)

- Please provide any additional stakeholders to this list, and include any information you have available. The Working Group review the list as a group at the first meeting.
 - Keep in mind that the goal is to come up with a comprehensive stakeholder list. Decisions on how we engage them will come at a later date.

Note: If you have additional or different information for a stakeholder who is already on the list, please add that information to the spreadsheet as a comment.

2. Catalog of education and networking currently being offered (Edu & Networking Tab)

Please provide any additional stakeholders to this list, and include any information you have available. The Working Group review the list as a group at the first meeting.

- This Working Group will develop recommendations for the Steering Committee on what types of events are needed to fill their stakeholder gaps. This will be cross referenced with other Working Groups

3. Discuss Stakeholder CII/CID Participation Strategy (ie, Sponsorship, Promotion, etc.) and Marketing Strategy. Ideas to be presented to and integrated with the Event Architecture Working Group outcomes.

DRAFT Working Group Meeting Agenda:

1. Review Stakeholder List
 - a. Who's in?
 - b. What's missing?
 - c. Plan for additional entries
 - d. Directory roll-up
2. Education and Networking
 - a. What events are out there?
 - b. What other events are needed?
 - c. There's an opportunity for the Demand side to coordinate with the Supply side to ask for deal flow from the supply side. 1. Investor 2. Source of deal flow
3. Group recommendations and discussion at next Steering Committee meeting:
 - a. Stakeholder engagement
 - i. Outreach
 - ii. Marketing: Recommendations to Steering Committee on what is needed to advance
 - iii. Venture Participation
 - b. Fundraising Strategy: Be sure to fill out the Capacity column for each group

DRAFT Working Group Meeting Agenda:

1. Introduction of Working Group members
Attending:

Ceyl Prinster
Rich Hoops
Brad Weinig
2. Purpose of the Demand working group and goals for this meeting
3. Homework assignment details

- a. Not just friends or people you know
 - b. Casting a wide net for education
 - c. Minimum of 5 people/organizations to the list, or adding/expanding to ideas that other people put out. (Add contact info, do you have someone you know there? Better to have 10 at 50% than 5 at 100% -- we have resources to fill in contact info but need this group to provide the right direction)
 - d. This information will only be used to invite people to education events or Impact Day. We will let you know before we use it.
4. Review Stakeholder List
- a. Quick list review: Who's in?
 - i. City has a list of incubators out of Economic Development
 - b. Can we identify groups/organizations that need to hear this message but may think it applies to them?
 - c. Review Supply/Demand lists and think about who is missing from those segments
5. Education and Networking: How are we going to engage this market segment?
- a. Schedule of events
 - i. What events are out there?
 - ii. What other events are needed?
 - iii. How do we reach all corners of the state?
 - b. What tools and resources are needed to get this message out to the supply group? Brainstorming...
 - c. How is someone from Gunnison going to hear about Impact Day? How are they going to know that it applies to them?

Topics for future meetings:

- 1. Stakeholder engagement
 - a. Outreach: Marketing: Recommendations to Steering Committee on what is needed to advance
 - b. Fundraising Strategy: Be sure to fill out the Capacity column for each group

Rich Hoops

Tyler Hartnug

Carly Abrahamson

Caryn

Brad Weinig

Cyle Prinster

Steve Bachar

Katherine Pease

The Demand Directory could be the projects themselves or any of the obvious outreach vehicles to get to those projects. We will be reviewing that today. This will be a living working document that we will be coordinating with partners.

We wanted to start thinking about existing

Tyler-Organization that will help us find-Working group looking at accelerators.

The Event Architecture-

Supply Side-Impact Investors, not just foundations, but also family offices

Intermediary Working Group-focused on accelerators,

Rich-the question arose about the role of the demand size group in the determination of the pitch day, certainly we can build the directory, but the tool that we have is to be able to communicate it to as many pipeline partners as soon as we can. how will those two things connect?

On the supply side there is lots of room for education and assessment, but the demand side group is all about building the biggest group of candidates on Nov. 6

we need to know what we are going to sell

we can build a list of organizations

Who is going to own this?--the architecture will take the first draft, but the demand side will provide feedback first.

Karen-we started out with three different workgroups, but these will very soon be correlated.

Are these ventures?-We are open to both?

This will be sortable by different tags or queries-we just want to gather the information as we all think about it.

Tyler-enable

Rich-list of stakeholders is big, there is a category where we can mark pipeline partner-he would like to focus on pipeline partner first

We would like more entiteis than none-some will belong on all three workbooks

How do we have the pipeline partners to find the social entrepeuners that need capital? When we have the bones of what we are selling to them, then we engage in that outreach.

We would rather have more information and cast a wide net rather than needing every piece of contact information---work study students can fill in the gaps.

This group will not be spammed.

The next component in the Education/Networking tab and making sure this group is engaged up until the day.

It is more aware on the Supply side where those events are being held and what pipeline partners are doing. What are things happening right now, so we can understand where the needs are?

Tyler suggested emailing the folks and asking them their events.

Rich-stuck on education piece, it is much more clear on the supply side-most of our pipeline partners are incubators, etc.

I think we should populate it if we are willing to share. There is already event consolidation happening

Rich-find a few events where we can go and talk about CII

Develop a webinar?

Timeframe to combine--soon!