

**CALL FOR INVESTMENTS FROM VENTURE PHILANTHROPY UTAH
AT THE COMMUNITY FOUNDATION OF UTAH**

The Community Foundation of Utah is pleased to announce a Call for Investments for the sixth Social Investors Forum on September 20, 2017. Investments will be considered in nonprofit, for profit and hybrid organizations committed to improving the quality of life for Utahns.

On Feb 14, 2014, the Community Foundation of Utah hosted the first Social Investors Forum, a venue for which organizations pitch innovative ideas for solving social problems. Since then, \$347,000 has been awarded to social enterprises by Venture Philanthropy Utah, a group of investors with a shared commitment to innovation and sustainability in the nonprofit sector. At the fifth forum on June 29, 2016, six exceptional organizations were chosen to make their pitch to Venture Philanthropy Utah and one organization received a \$50,000 loan from Venture Philanthropy Utah to further its social enterprise.

ELIGIBILITY AND CRITERIA

This is not a grant application. The Investment Committee may consider loans, or other alternative financial investments, in addition to grants, for proposals with a core focus on creating positive social change. All proposals must meet the following criteria:

1. **Utah-based:** Must be operated in Utah, for the benefit of Utahns.
2. **Emerging:** We prefer emerging organizations and startups, **or** spin-off programs, **or** new initiatives in existing organizations committed to change.
3. **Innovative:** Must demonstrate a compelling new idea, a novel approach to solving a social problem.
4. **Sustainable:** Must include a commitment to a sustainable funding model.
5. **Impact:** Must describe the positive change or impact of your proposal

Please note we also will look favorably on proposals that bring additional resources to the table.

THE PROCESS

This is a two-part process. Applicants are asked to submit the one-page Call for Investments, which will be screened by a committee of experts. Finalists will then be chosen to present their idea at the Social Investors Forum.

Call for Investment: Please indicate your interest in this opportunity by submitting the Call for Investments to the Community Foundation of Utah by **5pm on Monday, August 7, 2017. Submission must be emailed to the Community Foundation of Utah at SIF@utahcf.org. Please use 10pt font in your responses. Do not send additional information; it will not be accepted or reviewed.** If you have questions about the submission process, please email SIF@utahcf.org.

Presentation at the Social Investors Forum on September 20, 2017: If selected to present, additional details will be provided, but in brief, presentations may be no more than **10** minutes in length and should involve no more than two individuals, each of whom must play a leadership role in the execution of the idea or program presented. You will then field questions from the investment committee for an additional 10 minutes. All pitch participants will be required to go through pitch training.

Please review the instructions below for completing and submitting the Call for Investment.

Please use the fillable fields provided in the PDF document and ensure that the document does not exceed one page in length. There is limited space for each answer and it is your responsibility to ensure that all of the responses are clear. If your narrative exceeds the fillable field space, you must reduce your narrative so that your entire response appears. **You have a maximum of 500 characters (about 110 words) for each question response.**

DIRECTIONS FOR COMPLETING THE CALL FOR INVESTMENT

Enter the name of the organization or proposal, choose the appropriate organization type from the drop down list, and enter the requested investment amount.

I. ISSUE

Understanding the issue or social problem provides context about your proposal. Describe the social problem being solved with the implementation of your proposal. Provide specific information about how your proposal will solve the social problem described and include **what is innovative about your approach.**

II. TARGET MARKET

An important component in understanding your proposal is describing its target market. Be specific about who or what benefits from your idea and describe how your proposal and/or organization provide a competitive advantage over other organizations providing similar services.

III. ORGANIZATIONAL CAPACITY

The capacity of your organization is a critical component for the success of your proposal. Provide your relevant past experience in both leading and managing a similar project, both operationally and financially. **Your idea must be sustainable**, meaning it is not reliant on donations for its continuing operations, and could generate income that can be used to sustain or grow the strategy. Please describe the means by which your proposal will be sustainable. In addition, please provide information about the annual operating budget of your proposal, and complete the table that specifically identifies revenue sources and operating expenses of your proposal, to show sustainability over the next three years. For illustrative purposes, here is an example of how this table could be completed:

	Startup Year	Year 1	Year 2	Year 3
This Investment	\$60,000			
Income Generated	\$0	\$30,000	\$55,000	\$70,000
Other Revenue	\$20,000	\$5,000	\$0	\$0
Total Expenses	\$100,000	\$30,000	\$35,000	\$45,000
Gain/ (Loss)	(\$20,000)	\$5,000	\$20,000	\$25,000

IV. IMPACT

Most importantly, using the information described in the first three sections, **please explain the specific impact** that this strategy will have on your target market and describe how the target market is positively impacted or changed as a result of your strategy. Then identify the specific metrics that you will use to tell the story of your proposal's impact.

Organization or Proposal Name:

Organization Type:

Requested Investment Amount:

I. ISSUE

The social issue or problem being solved:

How this proposal solves it:

II. TARGET MARKET

Primary beneficiaries:

Your competitive advantage:

III. ORGANIZATIONAL CAPACITY

Relevant leadership experience:

Describe sustainability plan:

Annual Operating Expenses for Proposal at Full Implementation:

Sustainability Plan (Revenue and Expenses)	Startup Year	Year 1	Year 2	Year 3
This Investment				
Income Generated				
Other Revenue				
Total Expenses				
Gain/ (Loss)				

IV. IMPACT

Describe specific impact on target market:

Metrics used to measure impact:

Contact Name:

Contact Email:

Contact Phone:

Management Team:

Current Investors:

Location:

Referred By:

Website:

Year Founded: