**Impact Investing Practicum**

**Investment Firm Application 2018**

*What it is: Impact Investing Practicum*is an eight week consultation (128 hours) offered to five impact investing firms by the Haas School of Business, UC Berkeley. *Impact Investing* helps firms develop solutions, creating value for the firm by leveraging the financial and social impact backgrounds and skills of Haas MBA students.

*Who is involved:* This experiential learning consultation is co-taught by Adair Morse, Associate Professor, Haas Finance Group, and Nora Silver, Faculty Director and Adjunct Professor of the Center for Social Sector Leadership; with programmatic management by Seren Pendleton-Knoll, Program Director of the Center for Responsible Business. The consultation is run in conjunction with the second half of the Haas course *New Venture Finance,* taught by Adair Morse, which educates students in venture landscape, raising finance, and financial contracts and notes. Nora Silver and Adair Morse will meet with the student teams and provide regular oversight.

*How it works:* Small teams of MBAs work with the impact investing firm to tackle a key question for the company. Small teams will be made up of at least one individual with a strong financial background, and at least one individual with a strong social impact background. Students generate a final presentation and report delivered to the firm.

*What is needed from the firms?:* Firms chosen will have a strongly scoped consultation project of 128 hours of work; as well as a dedicated staff member who will supervise the teams for 2-3 hours/week during the 8 week consultation.

*When it happens:* May to August Discussions with firms

**September 29, 2017 APPLICATIONS DUE**

Mid-September Applicants notified

Fall 2017 Short scoping sessions

March 2018-April 2018 8 week consultation

~April 30- May 4 2018 Final Presentations & Deliverables

**To apply or for more information, please contact:**

Seren Pendleton-Knoll

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Client Application

Due by September 29, 2017

**I. CONTACT DETAILS**

Name of Organization:

Address:

Web Site:

Twitter/Facebook:

Your Name:

Title:

Phone:

E-Mail:

**II. ORGANIZATION**

1. Background information:

* Year founded:
* Amount of investments per year

* Number of employees:
  + Full Time:
  + Part Time:

2. Investment Principles/Mission:

3. Briefly describe the major services of your firm, and any characteristics that set it apart from other impact investing firms:

**III. POTENTIAL PROJECTS**

4. In the table below, please describe up to three potential consulting projects that address important issues that you and your firm are facing. In addition to your description of the project please include:

* Desired Deliverables: what you would like the student pair to deliver at the end of the 8 weeks (e.g. financial model, feasibility report, etc.)
* Expected Benefits: describe as clearly as possible how much your firm would stand to gain (or avoid losing) by resolving these issues.
* Other Specifications /Required Qualifications: any specific desired student background/skills for this project, conditions or constraints or other relevant information for this project.
* Importance: rate the importance of each project to the organization on a scale from 1-10 (where 1 represents a small problem and 10 a crucial issue for the organization) and briefly describe why you assigned that number.

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| **Project Description**  **Desired Deliverables**  **Expected Benefits**  **Other Specifications /Required Qualifications** | **Importance** (1-10) |
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**lV. CLIENT PROJECT LEADER/EXPERIENCE**

1. Please indicate the person who will be your project lead and their time commitment for this project. Additionally, please list any other key project participants and their time commitment. At a minimum, we anticipate 2-3 hours a week will be required of the lead to guide the team.

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| --- | --- | --- | --- | --- |
| **Name and email address** | **Title** | **Years with firm** | **Project Role** | **Project Time Commitment** |
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7. Please describe the key challenges you anticipate in working with a Haas MBA team. What concerns or challenges do you believe must be successfully addressed for an effective engagement.