

## Social Impact Investing: Executive Education Program

Mission Throttle is pleased to partner with the Tony R. Wells Foundation to host this three day course for nonprofit and social enterprise executives. The course provides a thorough understanding of the legal, tax and financial considerations of using social impact investments to support operations or pursue social enterprise initiatives.

### PROGRAM DATES

Tuesday, February 10th - 12th 2015  
9:00 a.m – 5:00 p.m.

Two Towne Square  
Southfield, MI 48076

### PROGRAM FEE

\$2,100 (scholarships are available in amounts of 60-100% of the program fee)

### ADMISSIONS

#### Application Process

Admission is by application only, on a rolling, space-available basis. Early application is encouraged.

#### Program Fee

The program fee includes all instructional materials including case studies, readings, and handouts; financial models, worksheets, and sample legal contracts; daily breakfast, lunch, and coffee / snack breaks; and one select networking dinner event.

[Apply Now](#)

### LEARNING OBJECTIVES

- Bring sustainability to the operations of your organization and reduce dependence on grants, donations, and / or government reimbursements.
- Gain the confidence to approach foundations as investors and learn new ways to improve these relationships.
- Learn how to work with your board and other key stakeholders more collaboratively to meet your goals.
- Understand how your ideas will be analyzed by an investor to help anticipate objections and craft a strong investment proposal.
- Cultivate a network of social innovators to rely on as you pursue social enterprise projects and impact investments.

### TOPICS COVERED

- Understand the broader social impact investing ecosystem and how industry trends are creating exciting new funding opportunities.
- Discover how a nonprofit organization can generate earned income without jeopardizing its tax exempt status by using hybrid legal structures, contract relationships, or joint ventures.
- Learn ways a foundation can leverage its balance sheet to support nonprofit organizations and social enterprises beyond grants.
- Assess your organization's risk from a lender's perspective and learn about easy first steps to prepare to receive impact investment funding.

“ Everything you need to know about social entrepreneurship but were afraid to ask! A dynamic learning opportunity for any nonprofit executive considering social impact funding solutions. This was the most engaging training I have ever been to. ”

- Kathy Streblo, Foundation for the Challenged

“ The Tony R. Wells Foundation's course on Social Impact Investing is an absolute must for social entrepreneurs seeking to get their ideas off the ground. After completing the course you will have all of the tools and knowledge needed to best navigate the world of nonprofit and for-profit, for-good companies. ”

- Brent Bielinski, Nom Nom Nation

## COURSE INSTRUCTORS



**Tony Wells**  
*President, Tony R. Wells Foundation*

Tony Wells is a business veteran with 25 years of executive management experience as an entrepreneur, philanthropist, professional investor and board director.



**Patrick Westerlund**  
*Education & Impact Investment Consultant, Tony R. Wells Foundation*

Patrick Westerlund leads the foundation's executive education program, conducts due diligence on impact investment opportunities, and collaborates on the development of portfolio social ventures.

## ABOUT THE TONY R. WELLS FOUNDATION

The Tony R. Wells Foundation is a Columbus-based private family foundation that was created in 2001. Pursuant to its mission to “create value for our community by developing stronger nonprofit leaders and investing in the next generation of social innovations,” the foundation has spent nearly a decade investing into social enterprises, developing new social innovation models, and advising local nonprofit organizations that are considering social enterprise. The foundation regularly provides loans and lines of credit to nonprofits for operating needs and has provided the seed capital to fund numerous social enterprises.

## ABOUT MISSION THROTTLE

Mission Throttle is a Michigan-based impact investing firm dedicated to accelerating positive change in our local community. We invest in, advise, and support mission-driven organizations that seek to use business tools to generate positive social outcomes. While we support all work that addresses social and environmental problems, our ultimate vision is a world where business solutions and philanthropic values converge to achieve sustainable social change.

## A Special Thanks to our Partners



To learn more, contact Maria DeLorenzo at [mdelorenzo@missionthrottle.com](mailto:mdelorenzo@missionthrottle.com)