



SOCIAL IMPACT INVESTING

Executive Education Program



This cutting-edge three day course enables nonprofit, foundation and social enterprise leaders to leverage the power of social enterprise and social impact investing together to increase impact, improve stability, and grow the sustainability of their organizations.

UPCOMING PROGRAM DATES

Tuesday, February 16th - 18th 2016

Columbus, OH [Apply Now](#)

Tuesday, April 19th - 21st 2015

Columbus, OH [Apply Now](#)

PROGRAM FEE

\$2,100 (scholarships available)

What You Will Learn:

- What is a social enterprise, what can it do for your organization and what structures should be considered? (emphasis on legal, tax and funding options)
- How can you use impact investing to expand your mission and increase your total access to funding?
- What are foundations looking for in a social enterprise compared to a traditional grant funded program?
- What is the impact investing ecosystem and what industry trends are creating billion dollar funding opportunities?
- How can you access the extensive network, knowledge, and other resources of foundations through true partnerships?

Course Benefits:

- Understand the legal, tax, and financial issues your organization will face – before you face them – potentially saving thousands of dollars in professional fees and rework
- Cultivate a network of social innovators and receive detailed financial models, sample legal agreements and five free hours of consulting time to help you get started
- Expand your toolset beyond that of a typical nonprofit leader and stand out among your peers when you talk to funders
- Bring sustainability to your organization and reduce your dependence on grants, donations, and reimbursements



“ Imagine being the only interview candidate that knows what the hiring manager is looking for... Spending three days with a funder was hugely beneficial, as was the opportunity to build relationships and network. ”

Ernest Perry
HandsOn Central Ohio

“ Everything you need to know about social entrepreneurship but were afraid to ask! A dynamic learning opportunity and the most engaging training I have ever been to. ”

Kathy Streblo
Foundation for the Challenged

“ The class made it clear that anyone who wants to go down this path can succeed. The course has an enjoyable format that allows you to learn from dozens of real life examples as well as from other participants. ”

Kimberly Reynolds
Netcare Access

CONTACT:

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Tony Wells – Course Instructor
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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.

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.

GUEST SPEAKERS



Lisa Courtice, PhD.

EVP Community Research & Grants Management, The Columbus Foundation

Lisa Courtice oversees the development and implementation of grant policies, program priorities, impact investments, and areas of strategic grantmaking. She serves on several nonprofit boards.



Jane Pfeifer, CPA

Shareholder, Clark Shaefer Hackett

Jane Pfeifer is a not-for-profit taxation expert with CSH where she heads the firm's NFP tax group and consults with clients regarding matters such as unrelated business income tax.



David Martin, JD

Of Counsel, Bailey Cavalieri

David Martin is a corporate and business law attorney who assists businesses with their commercialization strategies and advises nonprofit organizations on social entrepreneurship.

ADMISSIONS

Application Process

Admission is by application only on a rolling, space-available basis. For that reason, 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; 5 free hours of consulting; all breakfasts, lunches, and coffee/snack breaks; and one select networking dinner event.

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A SPECIAL THANKS TO

